Security Administration Handbook

Table of Contents

Important Information Please Read

Security Administration Changes for HRMS Upgrade (Launch B)

Launch B provides new functionality for E-Recruiting and Grievance Professional Users:
- ❖ E-Recruiting through the HRMS Portal (Available 11/22/08)
- ❖ Some E-Recruiting and Grievance reports available through the
  HRMS Portal BI_Reports tab (Coming Soon)

Users who want to take advantage of this new functionality may need additional accounts and new roles in the HRMS Portal and in Business Intelligence (BI).

Below is a summary of the UserID accounts and setup needed to access this new functionality. For specific details on how to set up each user, please refer to the appropriate sections of this handbook. Agency Security Administrators must complete these steps.

<u>**E-RECRUITING USER – Access via the Portal - NO authorization for BI Reports**</u>

CLIENT	USERID ACCOUNT	ROLES (One or More)
EP0	8-digit Pernr account	SERP_RCF_ASSESSMENT SERP_RCF_DE_ADMIN_LIMITED SERP_DE_RCF_JOB_SEEKER_SUPPORT SERP_RCF_DECISION_MAKER SERP_RCF_MGR_AS_RECRUITER SERP_RCF_RECRUITER SERP_RCF_RECRUITER_LIMITED SERP_RCF_RECRUITER_SUPPORT SERP_RCF_REQ_REQUESTER
BIP	8-digit Pernr account Note: may have other BI roles for HR/FI/GR/ER	ZS_BI_GENERAL_ACCESS
HRMS PORTAL	Professional UserID - There are two different types: LDAP UserID: This account already exists in the portal. Users that are part of the state's Active Directory tree access the portal with their email address and network password. UME UserID: Agency Portal User Administrators create this account. The format for UME accounts are: agency domain\username (for example dop\mickeym).	ER_Assessment_GRP ER_DecentralAdminLimited_GRP ER_DeCentralJSSupport_GRP ER_DecisionMaker_GRP ER_ManagerAsRecruiter_GRP ER_Recruiter_GRP ER_RecruiterLimited_GRP ER_RecruiterSupport_GRP ER_RequisitionRequest_GRP
	Map the Professional User account to their BIP Pernr UserID	

E-RECRUITING USER – Access via the Portal - Authorization for BI Reports

CLIENT	USERID ACCOUNT	ROLES (One or More)
EP0	8-digit Pernr account	SERP_DE_REPORTS_AGYWIDE or SERP_DE_REPORTS_DIVERSITY or SERP_DE_REPORTS_LTD or
BIP	8-digit Pernr account	ZS_BI_XXXX_END_USER and (XXXX is 4 or 5 digit agency number) ZS_BI_XXXX_WBWT and ZS_BI_SOW_WBWT and ZS_BI_GENERAL_ACCESS and ZS_BI-ER_ANALYSIS (Infocube role)
	Notes: If this is an existing BI User who has a POWER_USER or END_USER role, you only need to add the ZS_BI-ER_ANALYSIS role. Depending on other requirements, the user may also have FI and/or HR and/or GR Analysis roles. Centralized E-Recruiting roles are handled by DOP.	
HRMS PORTAL	Professional UserID - LDAP or UME	BI_REPORTS_GRP
	Map the Professional User account to their BIP Pernr UserID	

GRIEVANCE USER – Access via the Portal - Authorization for BI Reports

CLIENT	USER ACCOUNT	ROLES
RP0	8-digit Pernr account	SR3P_DE_GRIEVANCE_ADMIN or SR3P_DE_GRIEVANCE_INQ
BIP	8-digit Pernr account	ZS_BI_XXXX_END_USER (XXXX is 4 or 5 digit agency number) ZS_BI_XXXX_WBWT ZS_BI_SOW_WBWT ZS_BI_GENERAL_ACCESS ZS_BI-GR_ANALYSIS (Infocube role)
	Notes: If this is an existing BI User who has a POWER_USER or END_USER role, you only need to add the ZS_BI-GR_ANALYSIS role. Depending on other requirements, the user may also have FI and/or HR and/or ER Analysis roles. Centralized Grievance roles are handled by DOP.	
HRMS PORTAL	Professional UserID – LDAP or UME	BI_REPORTS_GRP
	Map the Professional User account to their BIP Pernr UserID	

DECENTRALIZED SECURITY ADMINISTRATORS

CLIENT	USER ACCOUNT	ROLES
RP0	8-digit Pernr account Add entry in the OOSB (T77UA) with the appropriate authorization data profile	SR3P_XXXX_USER_ADMIN and/or SR3P_XXXX_AUTH_ADMIN
BIP	8-digit Pernr account	ZS_BI_XXXX_ USER_ADMIN ZS_BI_GENERAL_ACCESS
EP0	8-digit Pernr account	SERP_USER_ADMIN
HRMS PORTAL	Professional UserID – LDAP or UME	User Admin Role on the Assigned Roles tab

Checklist for UserID Account Maintenance

This checklist outlines what is required in each of the systems in order for a professional user to have appropriate access in the Human Resource Management System. This also outlines the steps to complete on professional and non-professional user accounts when employees transfer to other agencies or are withdrawn from state employment.

I. **HCM Professional Users**
   - Roles assigned to the position in HCM
   - SU01 User Account with validity dates and Agency User Group
   - >For SSO Users ONLY: Entry in SNC tab
   - Note: Effective April 27, 2010 agency Security Administrators will no longer need to assign licenses in SU01. Licenses are assigned automatically to the user account based on the roles assigned. Entry of Authorized Profile in OOSB
      - If PERS_ADMIN_PROC role is assigned add additional entry of WA_SOW in OOSB

II. **BI Professional Users**
   - Roles assigned in BI
   - SU01 User Account with validity dates and Agency User Group
   - >For SSO Users ONLY: Entry in SNC tab
   - Entry of Authorized Profile in OOSB in HCM
     Note: Effective April 27, 2010 agency Security Administrators will no longer need to assign licenses in SU01. Licenses are assigned automatically to the user account based on the roles assigned.

III. **E-Recruiting Professional Users**
   - Role(s) assigned in E-Recruiting
     Note: Effective April 27, 2010 agency Security Administrators will no longer need to assign licenses in SU01. Licenses are assigned automatically to the user account based on the roles assigned.

IV. **Portal Professional Users**
   - Email address (LDAP) or agency domain\username (UME) UserID account
   - BI Reporting for E-Recruiting, Grievance, HR or Finance :
      - SU01 User Account with validity dates (HCM – Section I)
      - Entry of Authorized Profile in OOSB (HCM –Section I)
      - SU01 User account with role(s) and validity dates in BI (BI - Section II)
      - BI_Reports_GRP role assigned to the Professional portal account
      - Professional Portal account mapped to user's BI account
        **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapped to the Federated Portal.
   - E-Recruiting Functionality (*Professional Users in EP0*):
      - Role(s) assigned in E-Recruiting (E-Recruiting - Section III)
      - SU01 User account with General_Access role and validity dates in BI (BI - Section II)
      - Assign E-Recruiting Group role(s) that match E-Recruiting role(s) in Portal
      - Portal account mapped to user's BI account
        **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapped to the Federated Portal.
   - WEBGUI users
      - Roles assigned to the position in HCM (HCM – Section I)
      - SU01 User account with General_Access role and validity dates in BI (BI - Section II)
      - HR_HTMLGUI_GRP role assigned to the Professional portal account
      - Professional Portal account mapped to user's BI account
        **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapped to the Federated Portal.

When Employees Transfer out of the Agency (Professional Users Only)
- HCM – Delete employees profile entries in OOSB
- HCM – Change the User Group back to ESSUSER in SU01
-
- HCM – Delete the SNC entry – SSO only
- BI – Delete the BI user account
- E-Recruiting – Delete roles ONLY
- Portal – Delete user mapping for agency Domain\Username – UME Professional account
- Portal – Delete the Professional account (agency Domain\Username - UME) - LDAP e-mail address account cannot be deleted
- Portal – Delete the Group and/or User_Admin roles (LDAP)
- Portal – Delete user mapping for e-mail address account (LDAP)
  **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal.

When Employees Leave State Employment – Withdrawn Status (Professional and Non-Professional Users)
- HCM – Delete profile entries in OOSB if there are entries
- HCM – Delete the user account (SU01) – this takes away user's access to ESS
- BI – Delete the BI user account if created
- E-Recruiting – Delete roles ONLY
- Portal – Delete the ESS account (8 digit personnel number - UME)
- Portal – Delete user mapping for agency Domain\Username – UME Professional account
  **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal.
- Portal – Delete the Professional account (agency Domain\Username - UME) LDAP e-mail address account cannot be deleted
- Portal – Delete the Group and/or User_Admin roles from the e-mail address account (LDAP)
- Portal – Delete user mapping for e-mail address account (LDAP)
  **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal.

SAP License Assignment Matrix

Note: Effective April 27, 2010 agency Security Administrators will no longer need to assign licenses in SU01. Licenses are assigned automatically to the user account based on the roles assigned. License information will no longer show in SU01, in the LicenceData Tab. This matrix is for reference only. If you have questions about licenses please contact the DOP Service Center at 360-664-6400 or servicecenter@dop.wa.gov.

HCM (RP0)

Column A	Column B	Column C
mySAP Business Suite Professional	**mySAP Business Suite Limited Professional**	**mySAP Business Suite Employee**
SR3P_XXXX_AUTH_ADMIN SR3P_XXXX_USER_ADMIN SR3P_CE_GRIEVANCE_ADMIN SR3P_CE_OST_PAYOPS_ADMIN SR3P_CE_SECURITY_AUDIT SR3P_DE_BENE_PROC SR3P_DE_GARNISH_ADMIN SR3P_DE_GRIEVANCE_ADMIN SR3P_DE_FIN_RPT_PROC SR3P_DE_LEAVE_CORR_PROC SR3P_DE_ORG_MANG_PROC SR3P_DE_PAY_ANL SR3P_DE_PAY_PROC SR3P_DE_PAY_SUPV SR3P_DE_PERS_ADMIN_PROC SR3P_DE_PERS_ADMIN_SUPV SR3P_DE_QUALADM SR3P_DE_T&A_PROC SR3P_DE_T&A_SUPV and SR3P_SOW_ESS	SR3P_XXXX_DATA_PROFILE SR3P_XXXX_SECURITY_AUDIT CR3P_CE_INQ_HELP_DESK SR3P_CE_BENEFITS_INQ SR3P_CE_GARN_INQ SR3P_DE_GRIEVANCE_INQ SR3P_DE_ORG_MGT_INQ SR3P_DE_PAY_INQ SR3P_DE_PERS_ADMIN_INQ SR3P_DE_T&A_INQ and SR3P_SOW_ESS	SR3P_SOW_ESS

Business Intelligence (BIP)

Column A	Column B
mySAP Business Suite Professional	**mySAP Business Suite Limited Professional**
ZS_BI_XXXX_USER_ADMIN ZS_BI_XXXX_POWER_USER	ZS_BI_XXXX_END_USER ZS_BI_XXXX_SECURITY_AUDIT ZS_BI_XXXX_WBWT ZS_BI_GENERAL_ACCESS ZS_BI_SOW_WBWT ZS_BI-ER_ANALYSIS ZS_BI-FI_ANALYSIS ZS_BI-FI_SOW_ANALYSIS ZS_BI-GR_ANALYSIS ZS_BI-GR_SOW_ANALYSIS ZS_BI-HR_ANALYSIS ZS_BI-HR_SOW_ANALYSIS

E-Recruiting (EP0)

Column A	Column B	Column C
mySAP Business Suite Professional	**mySAP Business Suite Limited Professional**	**License field is blank**
SERP_CE_RCF_BUSINESS_ADMIN SERP_CE_RCF_JOB_SEEKER_SUPPORT SERP_CE_RCF_RECRUITER SERP_CE_RCF_USERLIST_ADMIN SERP_CE_SYSADM_RPTS SERP_DE_RCF_BUSINESS_ADMIN SERP_DE_RCF_JOB_SEEKER_SUPPORT SERP_RCF_ASSESSMENT SERP_RCF_DE_ADMIN_LIMITED SERP_RCF_MGR_AS_RECRUITER SERP_RCF_RECRUITER SERP_RCF_RECRUITER_LIMITED SERP_RCF_RECRUITER_SUPPORT SERP_RCF_REQ_REQUESTER SERP_RCF_RESTRICTED_RECRUITER SERP_USER_ADMIN SERP_WFM_DEVELOPER_LIMITED	SERP_CE_COMPLIANCE_ADMIN SERP_CE_REPORTS SERP_CE_REPORTS_DIVERSITY SERP_DE_REPORTS_AGYWIDE SERP_DE_REPORTS_DIVERSITY SERP_DE_REPORTS_LTD SERP_RCF_COMPLIANCE_ADMIN SERP_RCF_HIRE_MGR_SURVEY SERP_RCF_REQUISITION_OWNER	No Roles are Assigned, mySAP Business Suite Employee license will be automatically inherited from the RCF_CAND_INT reference user.

Systems Overview

As a Human Resource Management System (HRMS) Security User or Authorization Administrator, you will be responsible for assisting your agency professional staff interface with the DOP HRMS.
HRMS consists of: Human Capital Management (HCM), E-Recruiting, Business Intelligence (BI) and Enterprise Portal (HRMS Portal)

The chart below describes all of the systems and how they are accessed in very general terms:
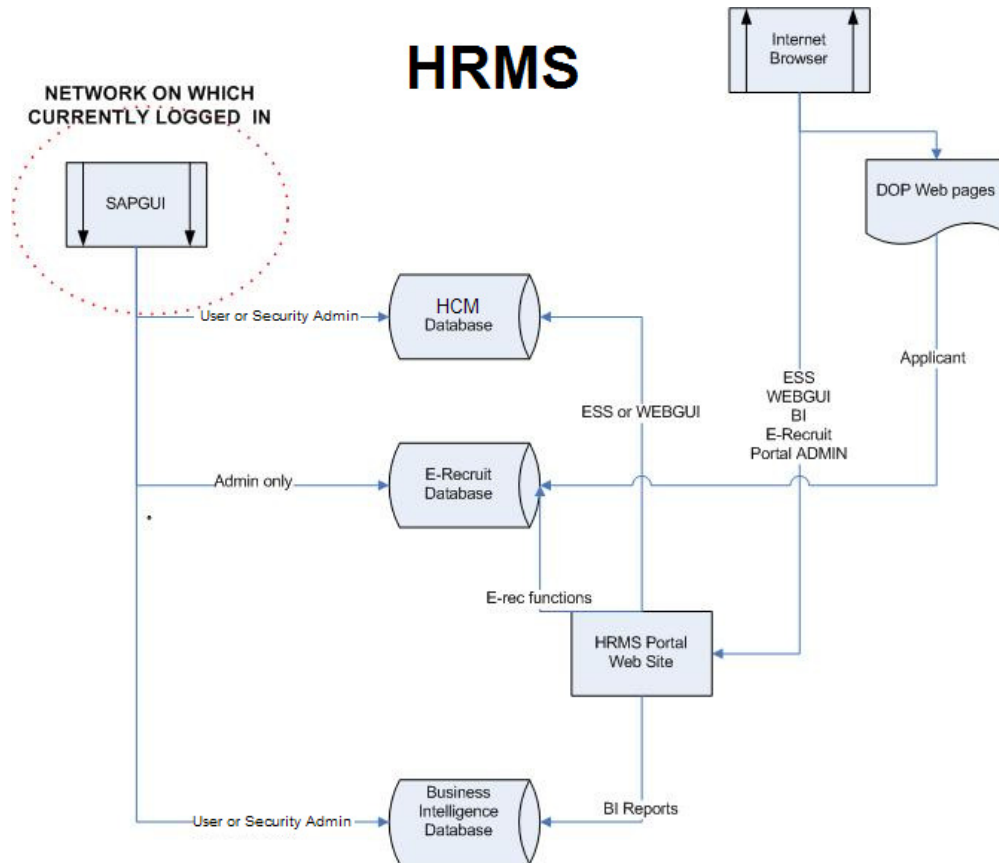
The "SAPGUI" noted at the top left of the diagram is a Desktop application entry point. If your agency works within the State Government Network (SGN), the SAPGUI gives you a "stateful" connection to the following applications:
- HCM database of Personnel and Payroll information
- E-Recruiting Database
- Business Intelligence (BI) - previously called "Business Warehouse"

If you are in a K-20 system or the Military system or otherwise OUTSIDE the SGN, specific arrangements can be made with DOP or DIS in order for your agency to access the HRMS systems.

The HRMS Portal is an alternative method of entering the various systems using a professional portal UserID (LDAP or agency UME).
The HRMS Portal is the ONLY way to enter Employee Self Service (ESS) using an 8 digit pernr.

The HRMS Portal is available for access from outside the SGN via the internet -
https://wahrms.wa.gov/irj/portal

The HRMS Portal is available for access from inside the SGN via the internet -
https://myhrms.wa.gov/irj/portal

General Naming Conventions

There are several parts/nodes to the role names in the HRMS. The following is the explanation of each node:

- ➢ The First Node identifies whether the role is a "**S**"ingle role or "**C**"omposite, "**R3**" or "**ER**" and that it is a "**P**"roduction role
  - ▪ Single roles will begin with "**S**"
  - ▪ Composite roles (roles made up of single roles) will begin with "**C**"
  - ▪ HCM (old R3) Roles will have "**R3**" as the second and third characters in the role name.
  - ▪ ER Roles will have "**ER**" as the second and third characters in the role name.
  - ▪ The fourth character will be "**P**" identifying the role as a production role.
- ➢ The Second Node identifies whether the role is ("**DE**"centralized or "**CE**"ntralized) or custom
  - ▪ Decentralized roles and "SR3P_SOW_ESS" may be assigned by agency Authorization Administrators.
  - ▪ Centralized and custom roles may only be assigned by DOP.
- ➢ All subsequent Nodes describe the intended role function.
  - ▪ Example: SR3P_DE_PAY_ANL – Decentralized Payroll Analyst, built as single role and assignable by agencies.
- ➢ BI roles begin with 'ZS_BI*' the remaining characters being as descriptive as possible to match the role name.
  - ▪ Example: ZS_BI _1110_USER_ADMIN – BI User Administrator for a particular agency.

HCM Roles

HCM Roles generally consist of at least one Decentralized Role or Centralized Role and a Structural Data Profile Role.

Security Admin, Auth and Audit Roles consist of at least one Security/Auth/Audit Role and a Structural Data Profile Role.

- ➢ Decentralized HR Roles begin with 'SR3P_DE*' with the remaining characters being as descriptive as possible to match the role name.
  - ▪ Example: SR3P_DE_PAY_ANL – Decentralized Payroll Analyst
- ➢ Centralized HR Roles begin with 'SR3P_CE*' with the remaining characters being as descriptive as possible to match the role name.
  - ▪ Example: SR3P_CE_FINC_APRV – Centralized Financial Approver
- ➢ Security Admin and Auth Roles begin with 'SR3P_XXXX*' with the remaining characters being as descriptive as possible to match the role name, and XXXX being the Personnel Area/Agency.
  - ▪ Example: SR3P_1110_AUTH_ADMIN – DOP Authorization Administrator
- ➢ Structural Data Profile Roles begin with 'SR3P_XXXX_DATA_PROFILE' with XXXX being the Personnel Area/Agency.
  - ▪ Example: SR3P_1110_DATA_PROFILE – DOP Structural Profile Role
- ➢ Security Audit Roles consist of Decentralized SR3P_XXXX_SECURITY_AUDIT or SR3P_CE_SECURITY_AUDIT.

NOTE: *All Centralized roles are assigned by DOP.*

User Groups in HCM and BI

➢ User Groups are formatted as follows: WA_XXXX
  ▪ Where XXXX = Personnel Area/Agency

➢ The description should match the agency name (example follows)
  ▪ User Group: WA_1110
  ▪ Description: Department of Personnel

BI Roles

BI professional users are required to have an HCM UserID with an agency Data Profile Role assigned to their position and the agency authorization profile entered in the OOSB, before creating the BI UserID account.

BI Roles Include:
  • one End or Power User role – ZS_BI_XXXX_POWER_USER / ZS_BI_XXXX_END_USER
  • one or more of the InfoCube Roles – ZS_BI-FI_ANALYSIS, ZS_BI-HR_ANALYSIS, ZS_BI-ER_ANALYSIS, ZS_BI-GR_ANALYSIS
  • agency and statewide Workbook/Web Template Roles – ZS_BI_XXXX_WBWT and ZS_BI_SOW_WBWT
  • the General Access role – ZS_BI_GENERAL_ACCESS

➢ BI End User, Power User, and Workbook/Web Template Roles begin with 'ZS_BI_*' and Personnel area with the remaining characters being as descriptive as possible to match the role name.

  ▪ Example: ZS_BI_1110_END_USER   – DOP BI End User

➢ BI InfoCube Roles (HR, FI, ER, or GR) begin with 'ZS_BI -*' with the remaining characters being as descriptive as possible to match the role name.

  ▪ Example: ZS_BI-FI_ANALYSIS
             ZS_BI-FI_SOW_ANALYSIS
             ZS_BI-HR_ANALYSIS
             ZS_BI-HR_SOW_ANALYSIS
             ZS_BI-ER_ANALYSIS
             ZS_BI-GR_ANALYSIS
             ZS_BI-GR_SOW_ANALYSIS

➢ Security Admin Roles begin with 'ZS_BI _XXXX*' with the remaining characters being as descriptive as possible to match the role name, and XXXX being the Personnel Area/Agency.

  ▪ Example: ZS_BI _1110_USER_ADMIN   – DOP UserID Administrator for BI

E-Recruiting Roles

➤ Decentralized E-Recruiting Roles begin with 'SERP_DE*' with the remaining characters being as descriptive as possible to match the role name.
  ▪ Example: SERP_DE_REPORTS_AGYWIDE
➤ Centralized E-Recruiting Roles begin with 'SERP_CE*' with the remaining characters being as descriptive as possible to match the role name.
  ▪ Example: SERP_CE_RCF_RECRUITER
➤ Security User Admin role in E-Recruiting does not distinguish between personnel areas. The role is SERP_USER_ADMIN

Portal Roles

Portal Roles include:
- Portal User Admin – Single role
- BI_Reports_GRP – Group role – Accessing BI Reports through the HRMS Portal.
- HR_HtmlGui_GRP – Group role – Accessing HRMS through the HRMS Portal
- ESS_ GRP – Group role – Accessing Employee Self Service
- Various ER_* Group Roles to access E-Recruiting functionality through the HRMS Portal. These roles should match the roles that are assigned to the Professional E-Recruiting users in EP0. See the HRMS Portal section of the Handbook.

HCM Authorization Administrator SR3P_XXXX_AUTH_ADMIN

Introduction

Security within the HRMS is based on a record called a "UserID". A UserID is necessary to enter a specific system within the HRMS. It is distinct and separate from personnel records and is the primary responsibility of the UserID Administrator. Things like name changes in the personnel/payroll records do NOT propagate to the UserID records.

Each UserID may be assigned Professional Roles which define how the user will interface with the specific system within the HRMS. In the Personnel/Payroll system (aka HRMS, R3 or HCM) Professional roles are divided into the following areas:
- Personnel
- Payroll
- Time & Attendance
- Grievance
- Organizational Management
- Security Administration

In each of those functional areas, there are tiers of access:
- "Processor" or "Administrator" levels have the most authority to update Master Data;
- "Inquiry" roles, which can view Master Data, cannot update it.
- "Supervisor" roles have some qualities of both Processors and Inquirers.

There are other roles available in the system, but decentralized agency authorization administrators only have the authority to assign roles available to their agencies.

Dept. of Personnel Setup for Non-Professional UserID accounts

1. DOP creates UserID for new hires (SU01)
2. DOP links Personnel Record to UserID (PA30)
3. DOP assigns the SR3P_SOW_ESS role
4. DOP creates ESS Portal accounts for new employees
5. DOP distributes ESS passwords to User Administrators

NOTE:
- New employee UserIDs are created by DOP twice weekly. DOP creates Employee Self Service UserIDs (Pernr-based) in the Portal. These ESS Portal accounts have access to 'My Personal Information', 'My Earnings Statement' and 'My Career' where the user can create their internal E-Recruiting profile and apply for state jobs.

Assign Roles to Positions Using PFCG
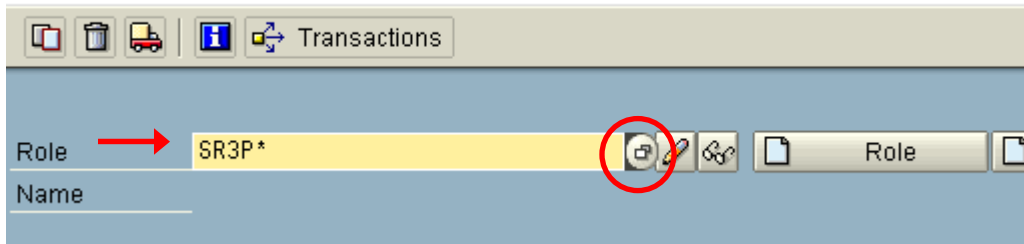
Prerequisites:
- ✓ Role name(s)
- ✓ SAP position number(s).

NOTE: *To quickly find the position number, do the following:*
PA20 → Enter Personnel number → Select Actions → Display → the position number will be under Organizational Assignment block in the middle of the screen. Copy the position number and continue with the Role Assignment steps below.

1. Enter transaction '**PFCG**' (/nPFCG) to assign roles to positions.

2. If you know the fully qualified role name, enter it in the 'Role' field, and skip to Step 5. Otherwise, search for a role that needs to be assigned to a position. Key SR3P* (for single role) or CR3P* (for composite role) and click on .

3. Verify/confirm the proper tab ('Single Roles' for SR3P*; 'Composite Roles' for CR3P*) and click on .

4. Double click on the appropriate role; for this example, 'Personnel Administration Inquirer' is selected.
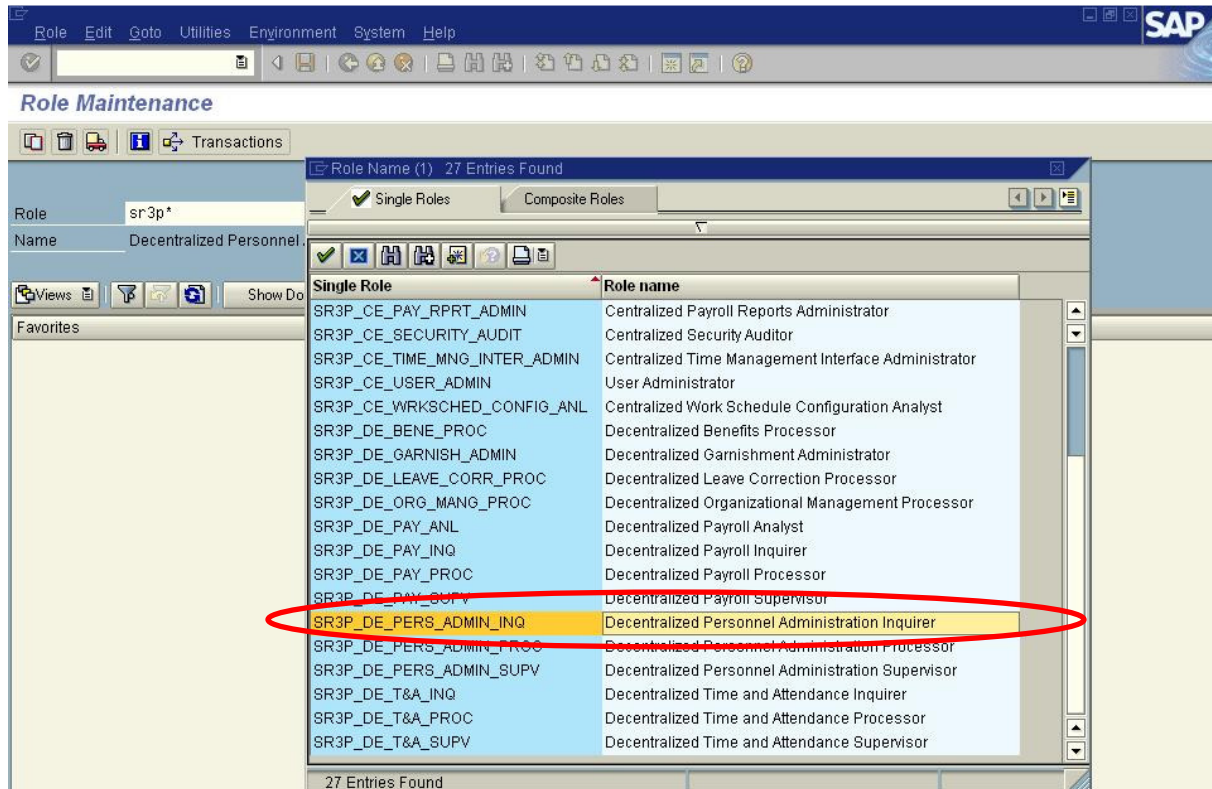
5. Once the role is selected, click on the ✏ edit button.
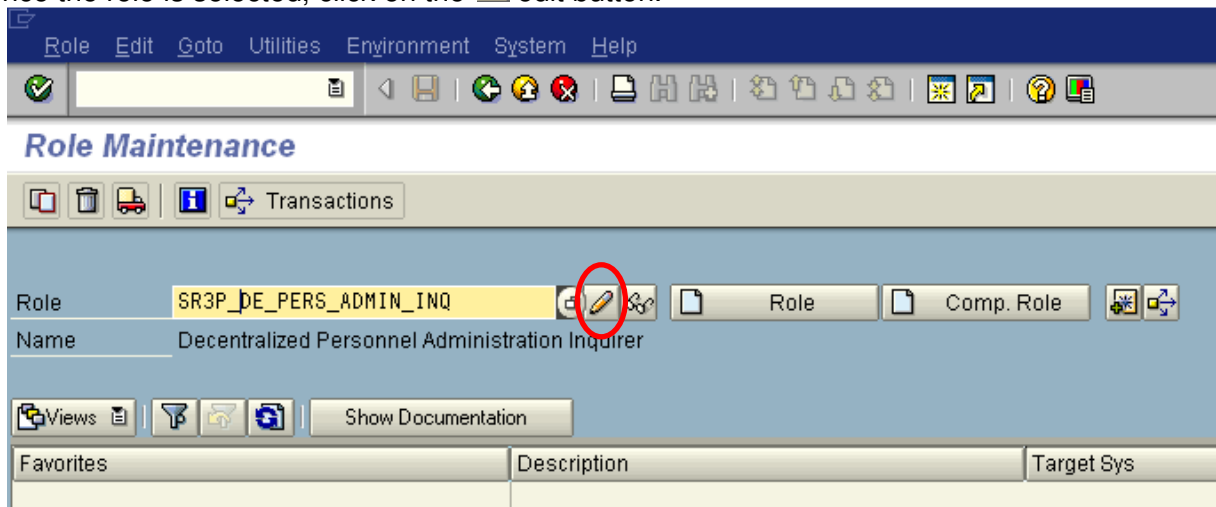
a. Click on the 'User' tab

b. Click on the "Organizational Mg…" button. **IF this button does not appear**, click on the ![back button] 'back' button, then click 'Goto' pull-down menu (on menu bar), select 'Settings" and select 'Complete View (Org Mgmt & Workflow)'. Then, repeat Step 5 above.
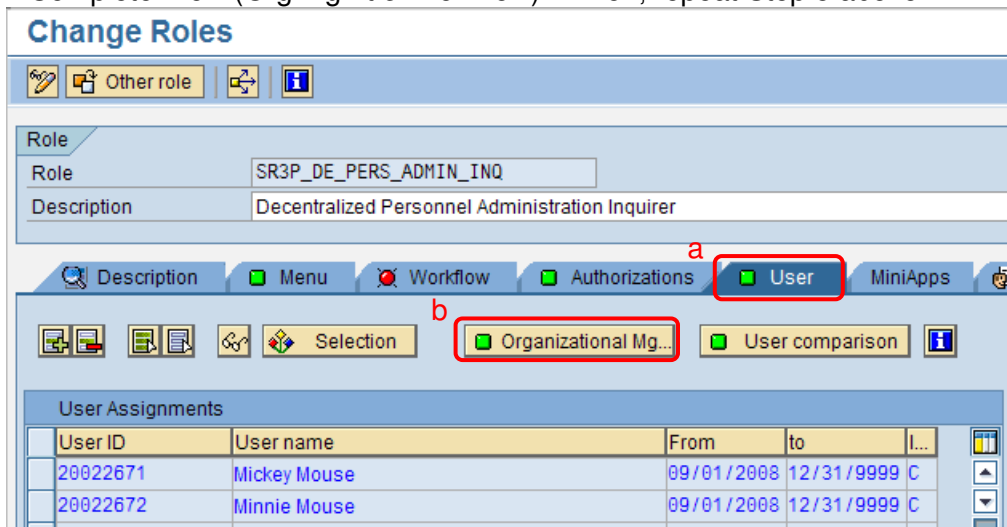
6. Click on the ![Create Assignment button] 'Create Assignment' button.
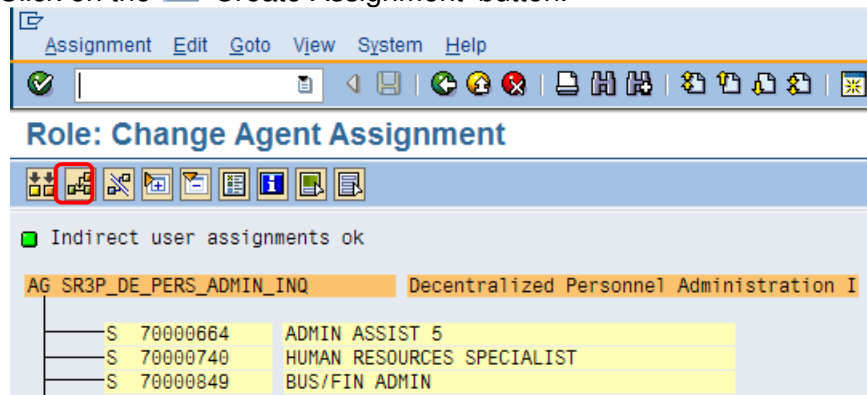
7. Choose agent type
   a. Click on 'Position' as the object type
   b. Click the ✔ 'enter' button.

Choose agent type

Icon	Object type
	Work Center
	Job
	Organizational unit
	Person
	Position
	User

a → Position (highlighted)

b ✔ ✖
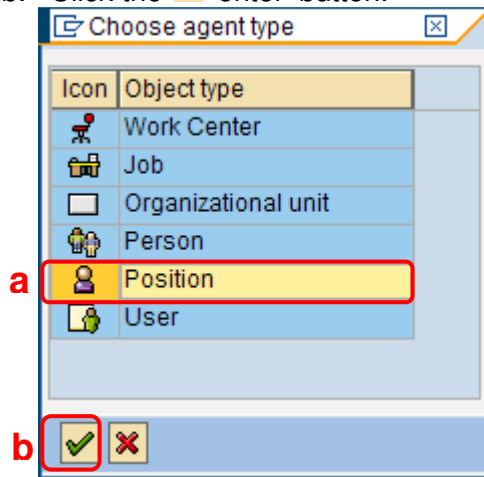
8. Enter SAP position number (w/o the 'S') in 'Search Term' field (overlay/replace the *), and click on ✔.

Choose Position

Search Term [*]

✔ 🔧 ✖
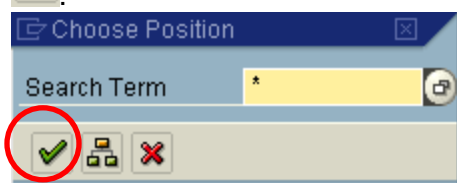
9. The appropriate role and position should be displayed.
   a. Confirm/verify SAP Position number is correct.
   b. Click 📄 'Create' to continue.

Create Relationship

Name	ID	Code	Valid from
▽ 🌐 Decentralized Personnel Administratic AG		SR3P_DE_P...	06/24/2009
👤 IT SPEC 3 **a**	S 70081901	0241	01/01/2005

Time period   06/24/2009 - 12/31/9999

b
📄 📊 ✖
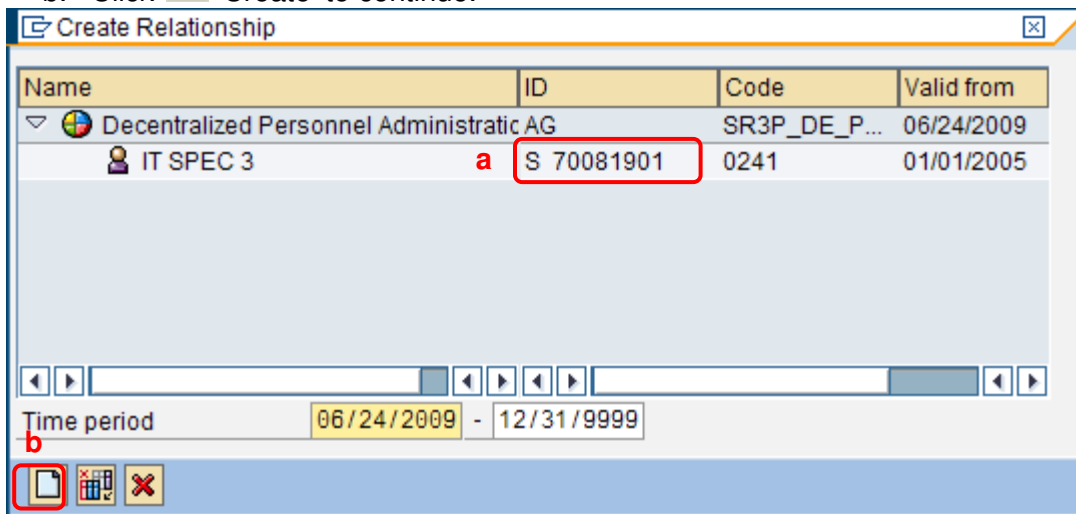
Reconcile the Roles Using PFCG

10. The position should now be displayed.
    a. Click on the 🗁 to drill down within the position to make sure that it contains the correct person and the UserID.
    b. Notice that there is a red button 🔴 at the top of the screen.
    c. Click on 🔳 'Indirect user assignment reconciliation' button and the button should then turn green
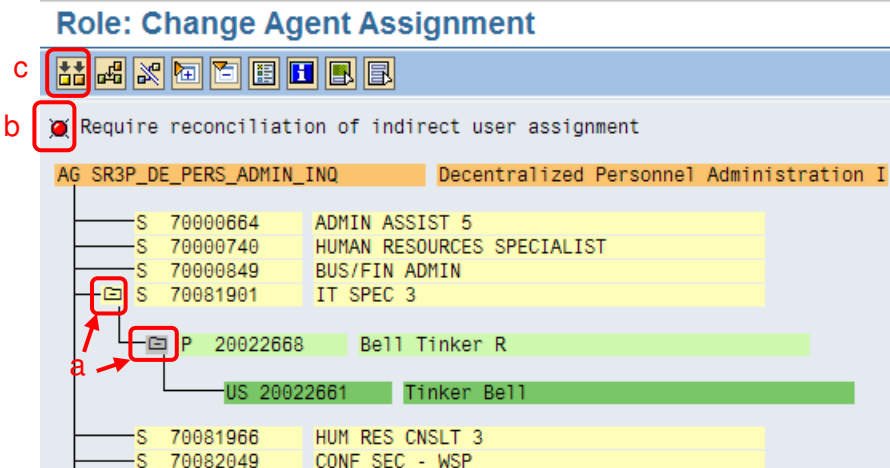
    d. Upon successful update you will see the following message in the status area:

    ✅ Data has been saved
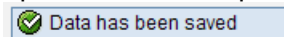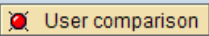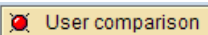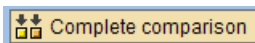
    e. Once the button is green, back out of this screen.
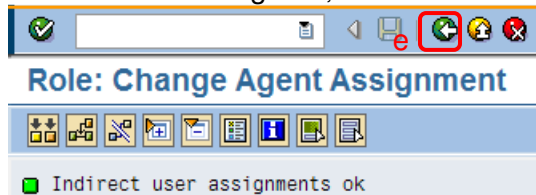
11. The UserID and user name should now be included in the list, in blue.
    NOTE: *Blue means the employee has roles assigned by position. You should always assign roles to position and not directly to the UserID.*
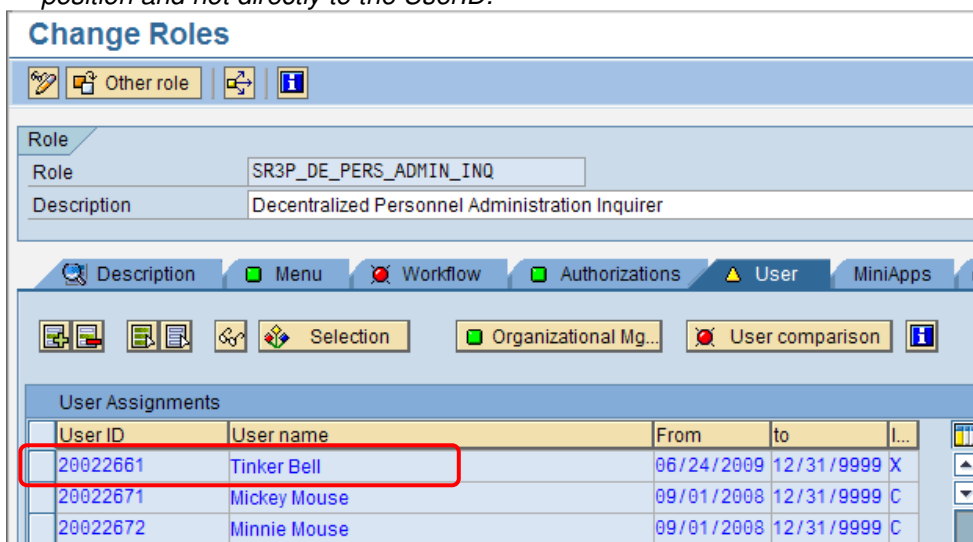
12. If the [User comparison] 'User comparison' button is red,

    f. Click on the [User comparison] button

    g. In the Compare Role User Master Record popup, click on [Complete comparison] 'Complete Comparison.'
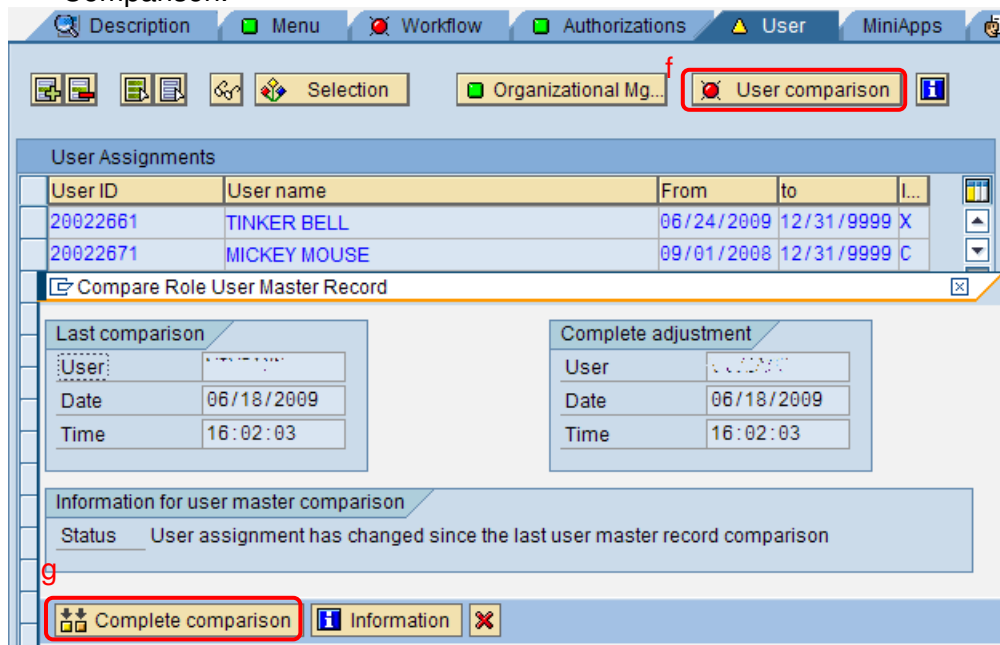
13. All buttons within the 'User' tab should now be green.
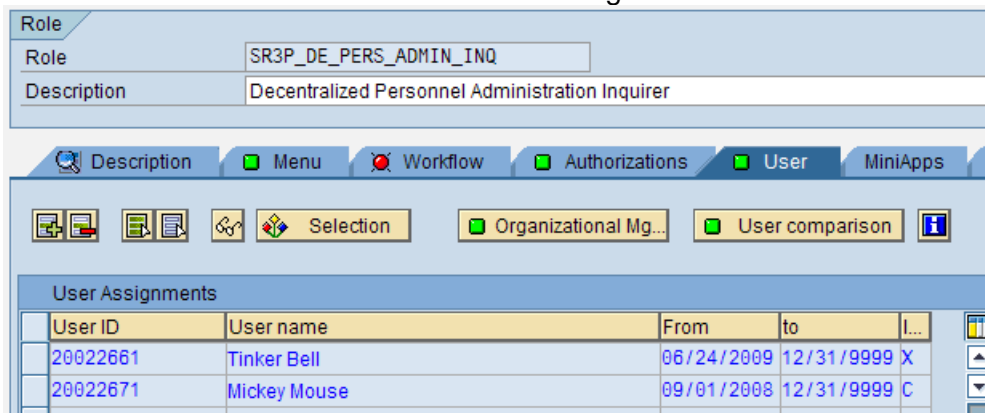
14. Click the 'Save' 🖫 button to save changes to the role.

15. Follow the same steps for **Assign Roles to Positions (PFCG)** to assign the agency Data Profile role with the following naming convention: SR3P_**XXXX**_DATA_PROFILE – where XXXX is your Personnel Area.

16. Contact your User Administrator after all roles are assigned, they need to go to SU01 and complete the steps for maintaining a professional user.

Assign Roles to Positions Using PPOMW

NOTE: *PPOMW transaction lets you assign multiple roles at once.*

Prerequisites:
- ✓ User's name or
- ✓ Users UserID/Personnel Number (8 digits) or
- ✓ SAP Position number
  - **NOTE**: *You must always assign roles to positions.*

1. Enter transaction '**PPOMW**' (/nPPOMW). You will see [✓ You have no authorization to change or delete.] in the status area. Disregard this message and continue.

Find the position number
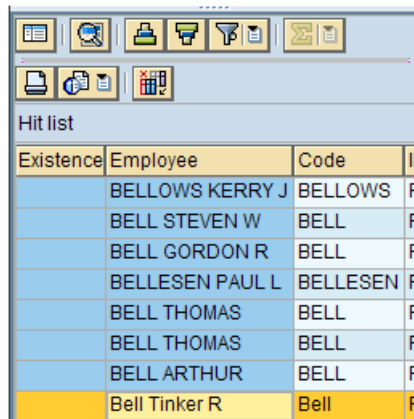
2. Search for position(s). Click on the ▷ button next to 'Person'.
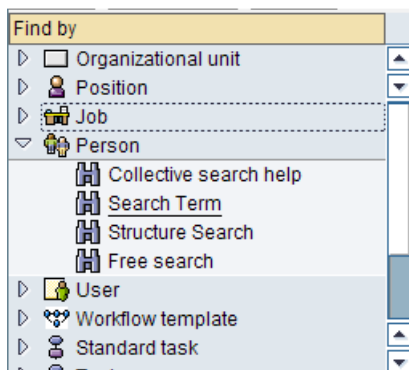
3. In the expanded display, click on the 'Search Term' and fill the resultant "With Name" box with EITHER the person's last name or the person's Pernr. Click the Find Icon.
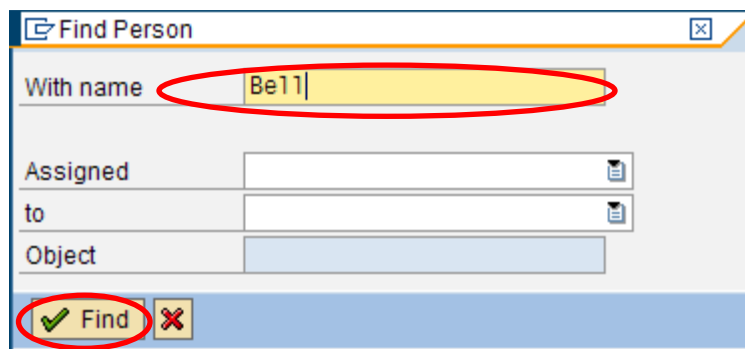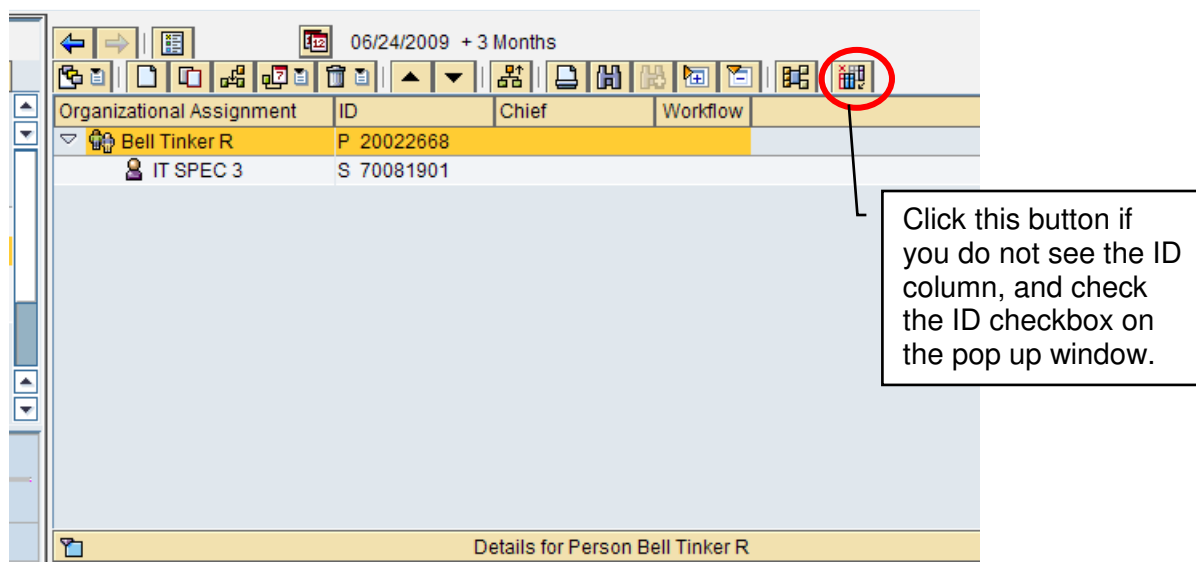
4. Double click on the desired name…

Existence	Employee	Code	I
	BELLOWS KERRY J	BELLOWS	F
	BELL STEVEN W	BELL	F
	BELL GORDON R	BELL	F
	BELLESEN PAUL L	BELLESEN	F
	BELL THOMAS	BELL	F
	BELL THOMAS	BELL	F
	BELL ARTHUR	BELL	F
	Bell Tinker R	Bell	F

Hit list

5. …and the Position number shows as the "S" entry under the "ID" column (In the upper right screen quadrant). Verify correct employee.

Organizational Assignment	ID	Chief	Workflow
▽ Bell Tinker R	P 20022668		
IT SPEC 3	S 70081901		

06/24/2009 + 3 Months

Click this button if you do not see the ID column, and check the ID checkbox on the pop up window.

Details for Person Bell Tinker R

Add the ID column

(If your presentation doesn't show you an ID column, click on the "columns" icon in the box circled in red above. A popup box as shown below will allow you to select columns. Put a checkmark in the "ID" box and click the green checkmark icon in the lower left.)
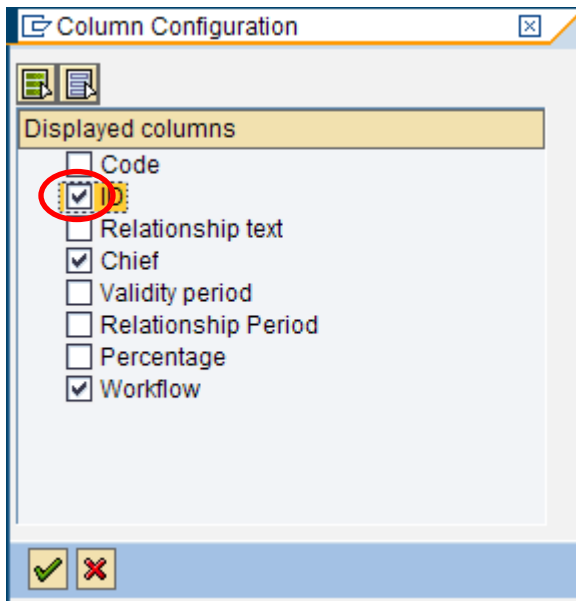
Show currently assigned roles

6. On the information screen shown here, right click on the position number…
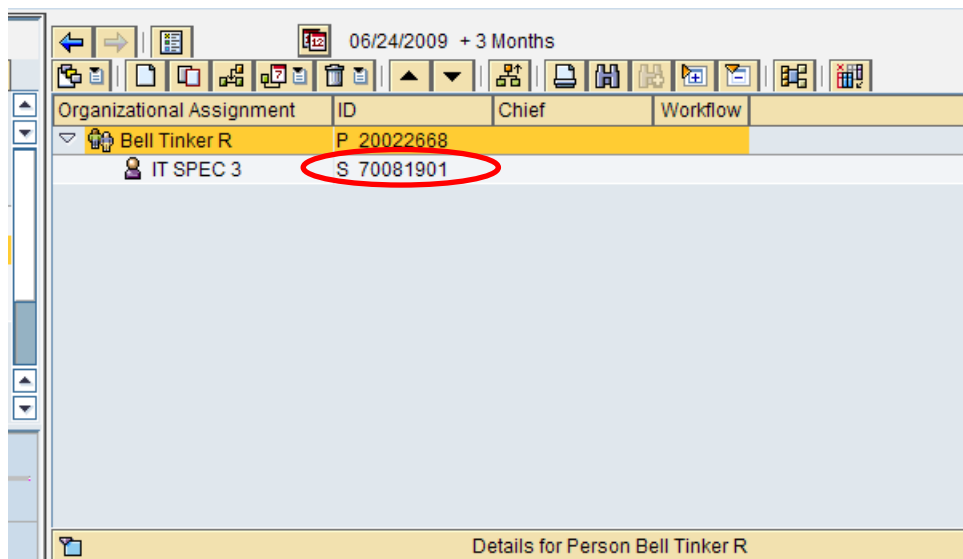
7. Highlighting the resultant "Goto" option will extend a box which allows you to select and click on "Task Assignment" as shown here.
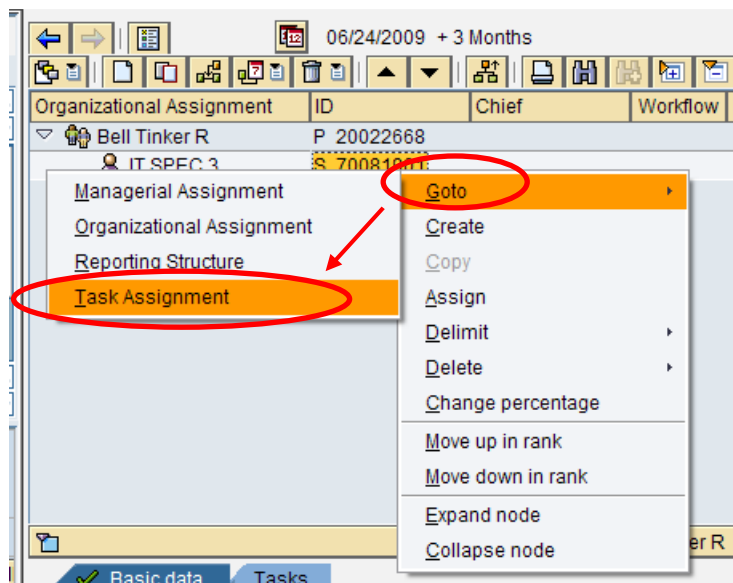
Add roles

8. This will show you all the professional roles assigned this Position number. To add more, right click on the position number again and select the "Assign"
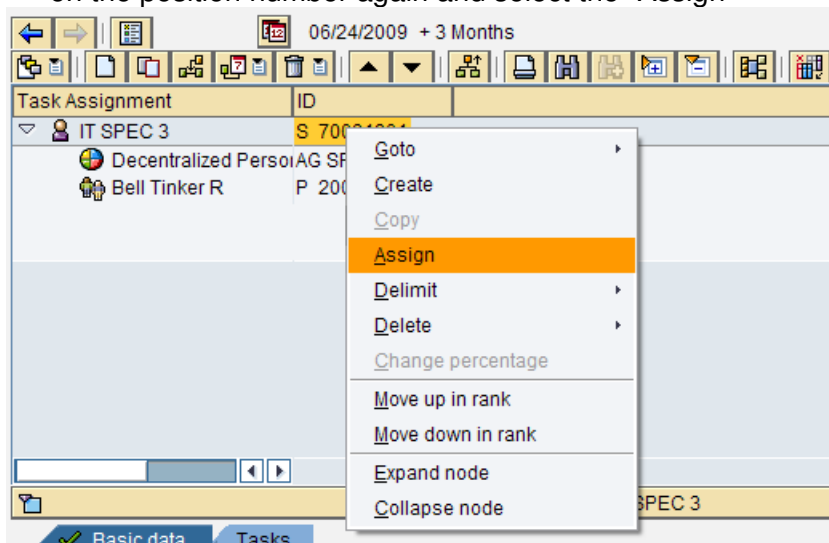
9. "Role" relationships can be assigned by double clicking on the bottom line (Is described by Role) shown here.. (or click the bottom line, then the green arrow…)
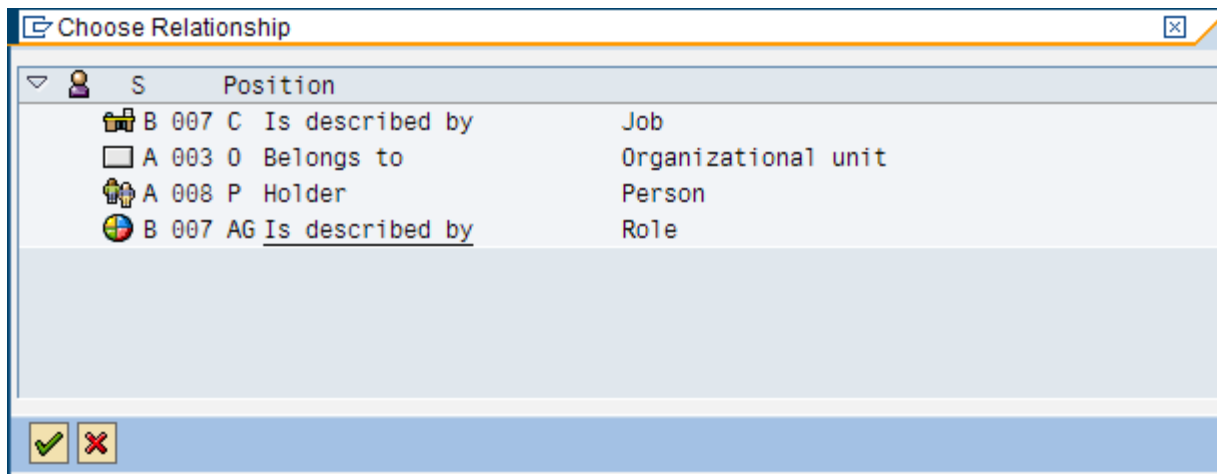
NOTE: *If you don't see the technical names such as AG next to the Is described by, go back to step 8, to the Choose Relationship screen. Right click anywhere on the screen and click on Key on.*
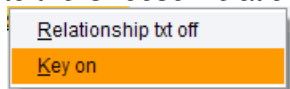
10. Enter SR3P_* to get a list of *all* the roles you can assign.
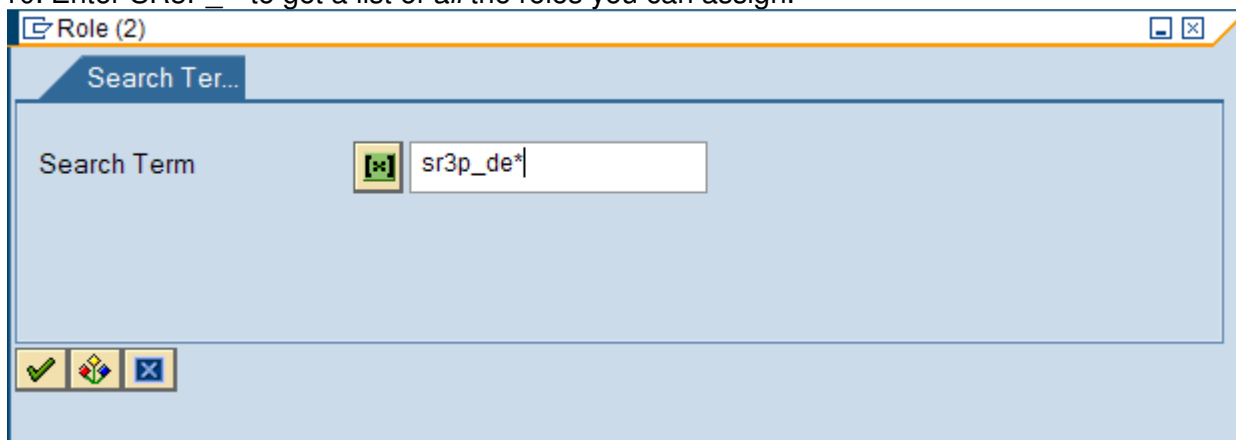
11. In the screen that follows, checkmark the roles that you want to assign to this position.

12. Click the Check mark button
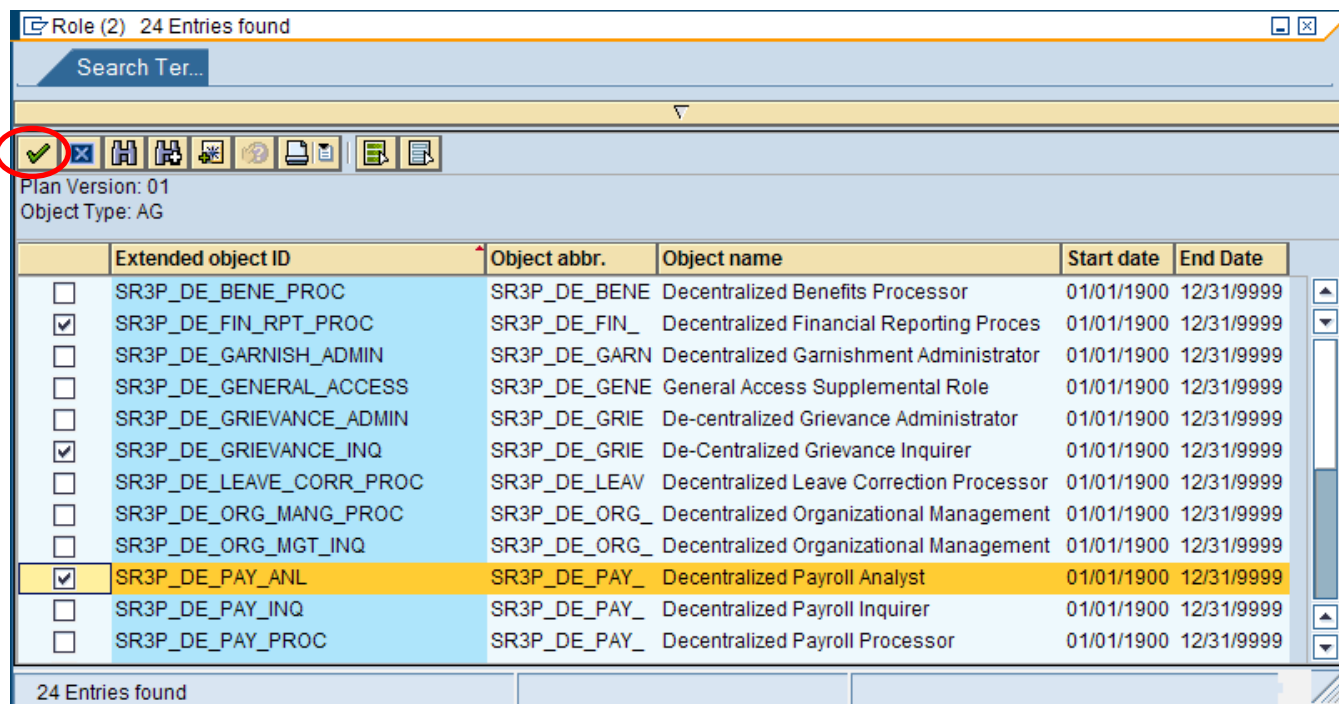
NOTE: *If you don't see the Extended object ID column, go back to step 8, to the Choose Relationship screen. Right click anywhere on the screen and click on Key on.*
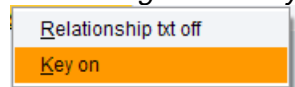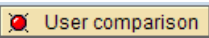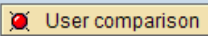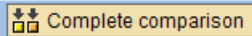
13. Click the Save button 💾
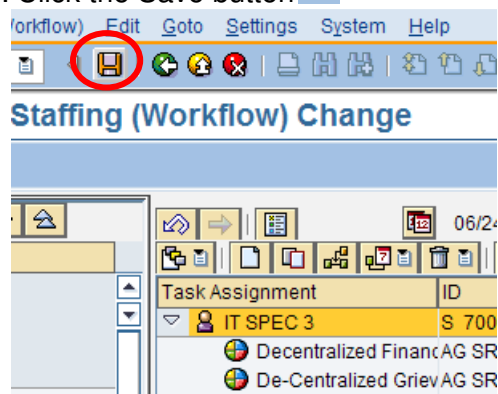
14. To reconcile these newly assigned roles, go to Transaction PFCG, Step 10: Reconciling the Role or complete the next steps.

Reconcile the Roles Using SU01D

1. Enter transaction SU01D (/nSU01D)
2. Enter the UserID (8 digit Personnel Number, ***including*** leading zeroes) into the 'User' field, of the employee you just added roles to.
3. Click on 🖧 to Display.
4. Click on the Roles tab
5. Double click on the red circle to the left of the newly assigned role.
6. Display roles window opens (this is the PFCG screen)
7. Click on the User tab

8. If the ![User comparison] 'User comparison' button is red,
   a. Click on the ![User comparison] button
   b. In the Compare Role User Master Record popup, click on ![Complete comparison] 'Complete Comparison.'
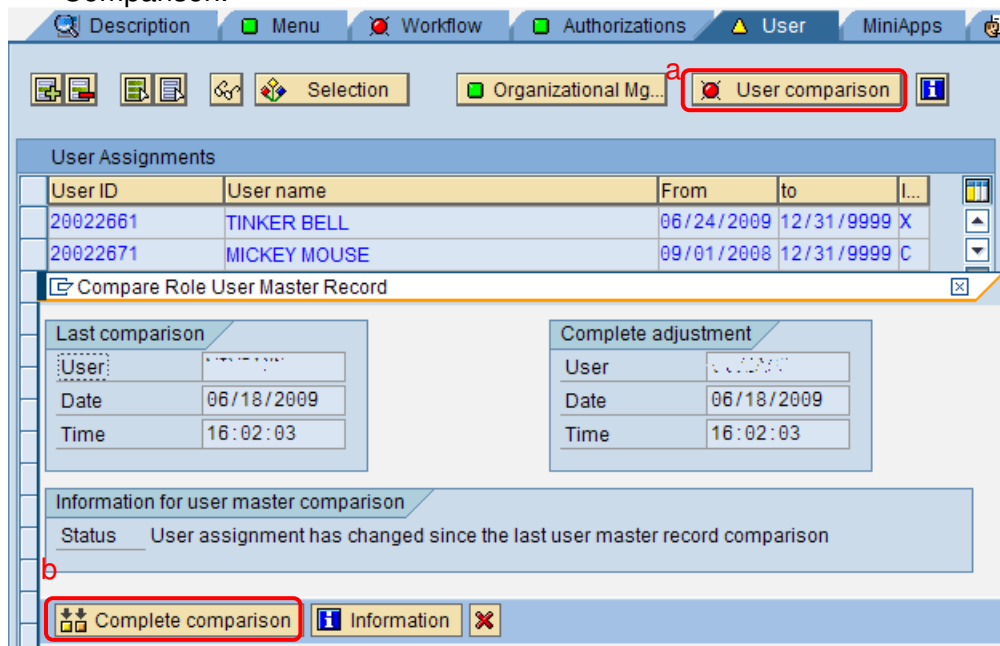
9. All buttons within the 'User' tab should now be green.
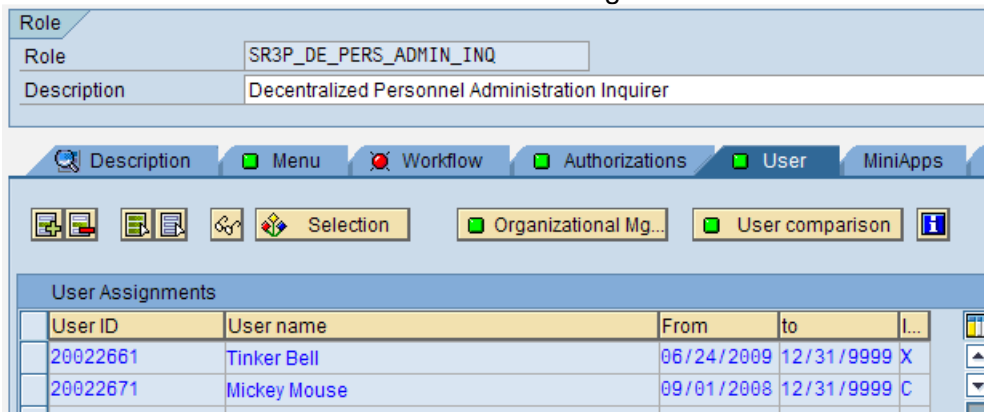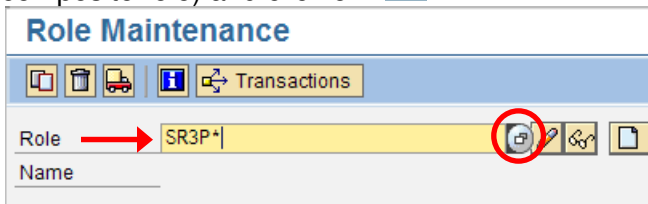
10. Click the 'Save' ![save] button to save changes to the role.
11. Close the Change Roles screen
12. Repeat from step 4 to reconcile any additional roles.
13. Contact your User Administrator after all roles are assigned, they need to go to SU01 and complete the steps for maintaining a professional user.

Delete Roles from Positions Using PFCG

Prerequisites:
- ✓ Role name(s)
- ✓ SAP position number(s).

1. Enter transaction '**PFCG**' (/nPFCG) to delete role(s) from position(s).

2. If you know the full role name, enter it in the 'Role' field, and skip to Step 5. Otherwise, search for the role that needs to be deleted from the position. Type SR3P* (for single role) or CR3P* (for composite role) and click on .

3. Verify/confirm the proper tab ('Single Roles' for SR3P*; 'Composite Roles' for CR3P*) and click on .

4. Double click on the appropriate role: for this example, 'Personnel Administration Inquirer is selected.

5. Once the role is selected, click on the edit button.

Role Maintenance

Role SR3P_DE_PERS_ADMIN_INQ   Single Role   Comp. Role

Name Decentralized Personnel Administration Inquirer

6. Update the Role
   a. Click on the 'User' tab
   b. Click on the "Organizational Mg…" button. **IF this button does not appear**, click on the ![back icon] 'back' button, then click 'Goto' pull-down menu (on menu bar), select 'Settings" and select 'Complete View (Org Mgmt & Workflow)'. Then, repeat Step 3 above.

Change Roles

Other role

Role

Role   SR3P_DE_PERS_ADMIN_INQ

Description   Decentralized Personnel Administration Inquirer

a.

Description | Menu | Workflow | Authorizations | **User** | MiniApps

b.

Selection   Organizational Mg…   User comparison

User Assignments

User ID	User name	From	to	I...
20022671	Mickey Mouse	09/01/2008	12/31/9999	C
20022672	Minnie Mouse	09/01/2008	12/31/9999	C

7. To display SAP position numbers, click on 'View' on the pull-down menu bar, and then click on 'Key On'. Click on the ![drilldown icon] to drill down; confirm/verify this change will only impact the correct person and the UserID. If position is "multi-filled", this action will remove access for all employees in this position.

Role: Change Agent Assignment

Indirect user assignments ok

AG SR3P_DE_PERS_ADMIN_INQ   Decentralized Personnel Administration I

    S 70000664   ADMIN ASSIST 5
    S 70000740   HUMAN RESOURCES SPECIALIST
    S 70000849   BUS/FIN ADMIN
    S 70000850   SR ACCOUNTANT
    S 70000913   COMP/FAC COORD
    S 70081901   IT SPEC 3
         P 20022668   Bell Tinker R
              US 20022661   Tinker Bell
    S 70082049   CONF SEC - WSP
    S 70082064   BUD&FISC ADMIN
    S 70082206   ADMIN ASST 3
    S 70082219   FISCAL ANALYST 1

8. Delete the assignment.
   a. Click on the position name (in yellow) to highlight it.
   b. Click on the ⊠ 'Delete Assignment' button.

Role: Change Agent Assignment

b.

🟩 Indirect user assignments ok
```
         S  70076844    ADMIN ACCT MGR
     ⊞ S  70076874    FISCAL ANALYST 2
         S  70076909    ADMIN BDGT AN
         S  70081765    HUMAN RESOURCE CONSULTANT
     ⊞ S  70081785    BUDGET ANALYST 3
         S  70081790    FISCAL ANALYST 2
     ⊞ S  70081794    FISCAL ANALYST 2
a.       S  70081816    FISCAL ANALYST 4
     ⊞ S  70081901    IT SPEC 3
         S  70081966    HUM RES CNSLT 3
         S  70082049    CONF SEC - WSP
```
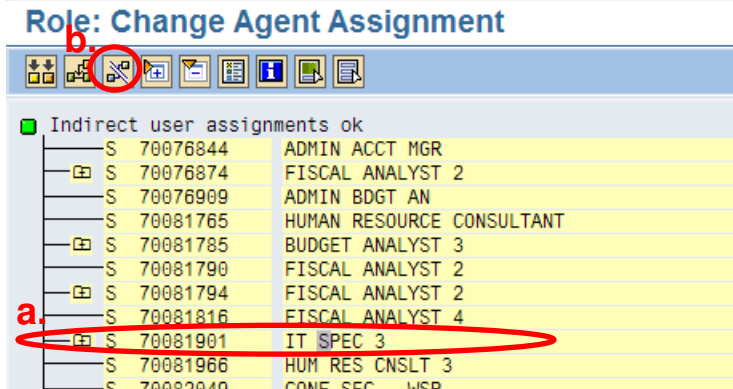
9. Verify all information is correct, and click the 'enter' button.

Role: Delete Agent Assignment ⊠

```
AG SR3P_DE_PERS_ADMIN_INQ Decentralized Perso

        S  70081901 IT SPEC 3
```

✓ ✗
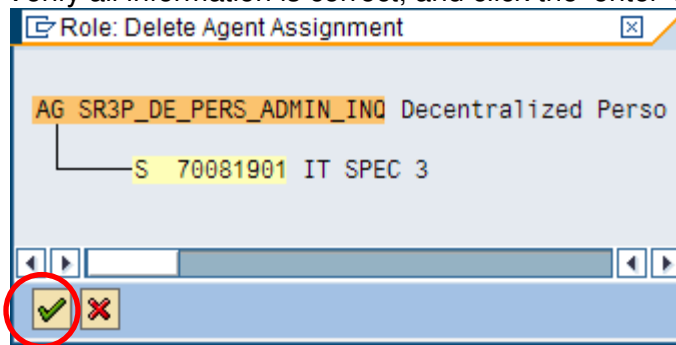
10. Notice the red light and message at the top of the screen; click on the ⬇⬇ 'indirect user assignment reconciliation' button to turn the light green.

Role: Change Agent Assignment

⚫ Require reconciliation of indirect user assignment

AG SR3P_DE_PERS_ADMIN_INQ   Decentralized Personnel Administration I
```
        S  70000664    ADMIN ASSIST 5
        S  70000740    HUMAN RESOURCES SPECIALIST
        S  70000849    BUS/FIN ADMIN
    ⊞ S  70000850    SR ACCOUNTANT
        S  70000913    COMP/FAC COORD
        S  70001726    HMS BAND 2
```
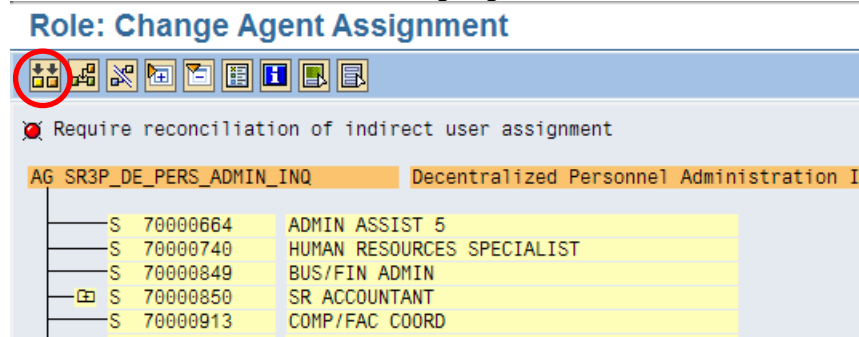
Upon successful update, you will see that the light has turned green, and the message

✅ Data has been saved in the status area.

Role: Change Agent Assignment

🟩 Indirect user assignments ok

AG SR3P_DE_PERS_ADMIN_INQ   Decentralized Personnel Administration I
```
        S  70000664    ADMIN ASSIST 5
        S  70000740    HUMAN RESOURCES SPECIALIST
        S  70000849    BUS/FIN ADMIN
```

11. Back out of this screen

Role: Change Agent Assignment
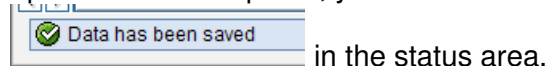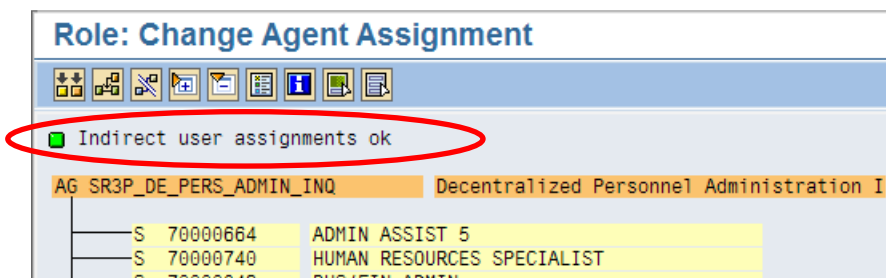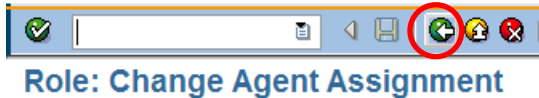
12. If the ⊗ User comparison button is red, click on the ⊗ User comparison button.

Change Roles

Role	
Role	SR3P_DE_PERS_ADMIN_INQ
Description	Decentralized Personnel Administration Inquirer

Description | Menu | Workflow | Authorizations | ⚠ User | MiniApps

Selection | ☐ Organizational Mg... | ⊗ User comparison

13. In the Compare Role User Master Record popup, click on ⬛ Complete comparison

Compare Role User Master Record

Last comparison			Complete adjustment	
User			User	
Date	06/24/2009		Date	06/24/2009
Time	13:33:08		Time	13:33:08

Information for user master comparison

Status   User assignment has changed since the last user master record comparison

⬛ Complete comparison   ⬛ Information   ✖

14. All buttons on the 'User' tab should now be green.

Change Roles

Role	
Role	SR3P_DE_PERS_ADMIN_INQ
Description	Decentralized Personnel Administration Inquirer

Description | Menu | Workflow | Authorizations | ☐ User | MiniApps

Selection | ☐ Organizational Mg... | ☐ User comparison

User Assignments

User ID | User name | From | to |
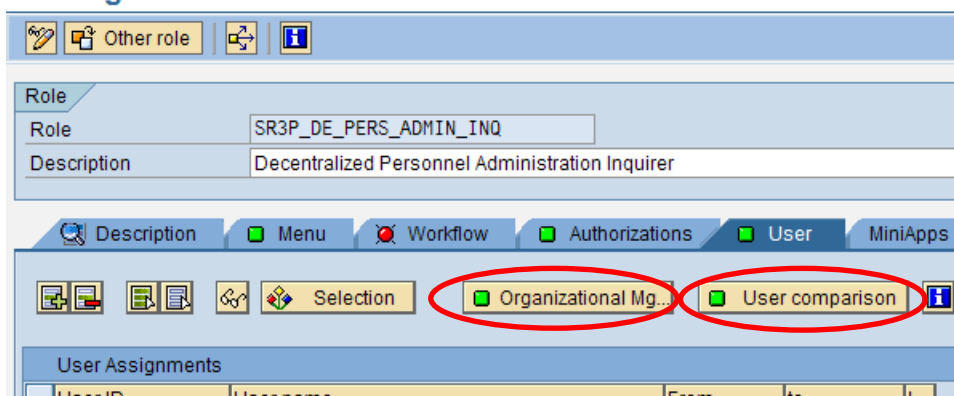
15. Click 💾 to save your changes. You will see the message ✓ Data was saved in the status area.

16. Follow the same steps for Delete Roles from Positions (PFCG) to delete any other roles.

17. If the person is no longer going to be a professional user, contact your User Administrator, they need to go to SU01 and complete the steps for transferring a professional user back to ESS user.

HCM User Administrator SR3P_XXXX_USER_ADMIN
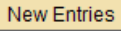
Maintaining a Professional HCM UserID Account

Agency User Administrators will use this process when changing a non-professional (ESSUSER) UserID account to a professional (WA_XXXX) UserID account in order to access HCM.
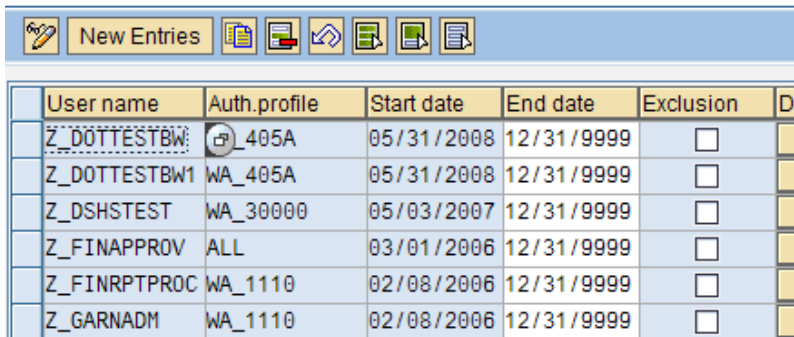
Prerequisites:
✓ *Professional roles must be assigned to the employee's position by the agency* Auth Administrator.

Enter OOSB Auth Profile
1. Enter transaction '**OOSB**' (/nOOSB) to update table T77UA.
2. Click on [New Entries] (New Entries) to enter the UserID.
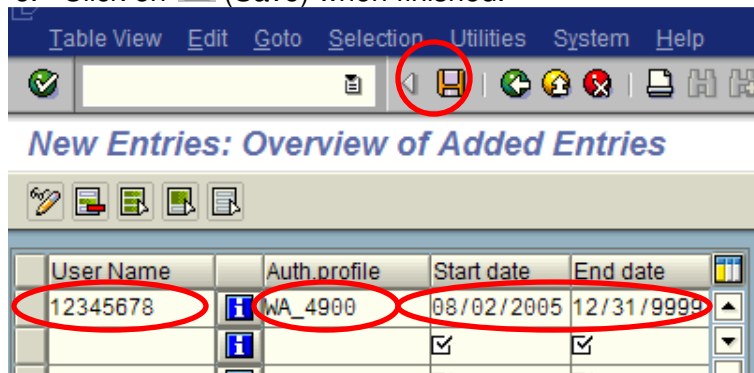
Change View "User Authorizations": Overview

User name	Auth.profile	Start date	End date	Exclusion	Di:
Z_DOTTESTBW	🔘 _405A	05/31/2008	12/31/9999	☐	
Z_DOTTESTBW1	WA_405A	05/31/2008	12/31/9999	☐	
Z_DSHSTEST	WA_30000	05/03/2007	12/31/9999	☐	
Z_FINAPPROV	ALL	03/01/2006	12/31/9999	☐	
Z_FINRPTPROC	WA_1110	02/08/2006	12/31/9999	☐	
Z_GARNADM	WA_1110	02/08/2006	12/31/9999	☐	

3. Enter the following:
    a. User Name – the UserID (Personnel number, ***including*** leading zeros)
    b. Auth. Profile – The User Group authorization profile (like: WA_4900);
        * Note **Pers Admin Processors require a 2ⁿᵈ entry w/Auth profile 'WA_SOW'.**
    c. Start Date
    d. End Date – if an exact date is known it should be entered, otherwise use 12/31/9999
    e. Click on 💾 (Save) when finished.

New Entries: Overview of Added Entries

User Name		Auth.profile	Start date	End date	
12345678	ℹ️	WA_4900	08/02/2005	12/31/9999	
	ℹ️		☑	☑	
	ℹ️				
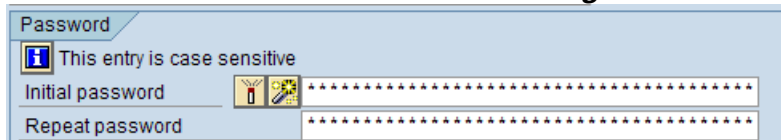
4. Upon successful save the following message will appear

✅ Data was saved
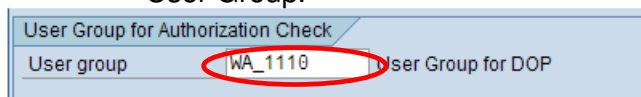
Update the UserID (SU01)

5. Enter transaction SU01
6. Enter the UserID (8 digit personnel number with leading zeros)
7. Click the Display button 🔍 to verify the user
8. Click on 📝 to enter Edit mode
9. From the 'Logon data' tab, update the following:
   a. Enter an initial password manually. The password must follow the hardened guidelines (8 characters which contain at least 1 digit, and 1 special character.)
      NOTE: *DO NOT use the wizard. It will generate a 40 digit password.*
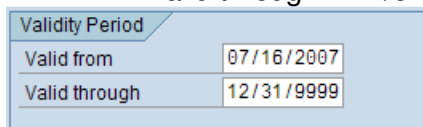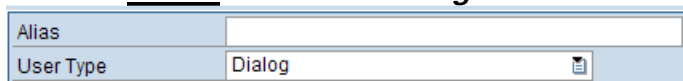
Password
🛈 This entry is case sensitive
Initial password ▯▯ **
Repeat password **

   b. Enter the User Group for your Agency. To search, click on the 🗗 button to search for your User Group.

User Group for Authorization Check	
User group	WA_1110 User Group for DOP
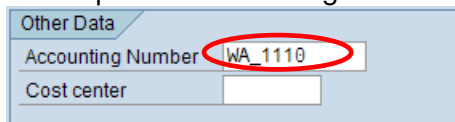
   c. Verify there are Validity Period dates, if there are no dates enter them as follows –
      1. Valid from – date of creation
      2. Valid through – 12/31/9999

Validity Period	
Valid from	07/16/2007
Valid through	12/31/9999

   d. Verify that the User Type is set to 'Dialog' *- this is very important, as the UserID will not work <u>unless</u> it is set to 'Dialog'.*

Alias	
User Type	Dialog ▤

   e. Populate "Accounting Number" field in "Other Data" with User Group data from 9b above

Other Data	
Accounting Number	WA_1110
Cost center	

10. Click on the Parameters tab and check the parameters. There should be 16 parameters entered, if the parameters are not entered enter the following parameters:
NOTE: *Enter only the Parameter ID and Value and then press enter.*

| Parameter ID	Value	Short Description
BUK	WA01	Company code
CAC	WA01	Controlling area
CVR	SOW-2	Variant for time recording
FWS	USD	Currency unit
HR_DISP_INFTY_NUM		HR: Display Infotype Number
LND	US	Country key
MOL	10	Personnel Country Grouping
PNI	US	Country Key Vector for Country-Specific Infotypes
POD	1	Default Status (PD)
POK	XX	PD: Views (Key, Short Text, Validity, etc.)
POP	01	Plan Version (PD)
PST	1	Planning Status (PD)
SCL	X	Upper and lower case in source code: 'X' = lower, ' ' =upper
UCN	US	Assigned Country
UGR	10	User group (HR master data)
USR	10	Users
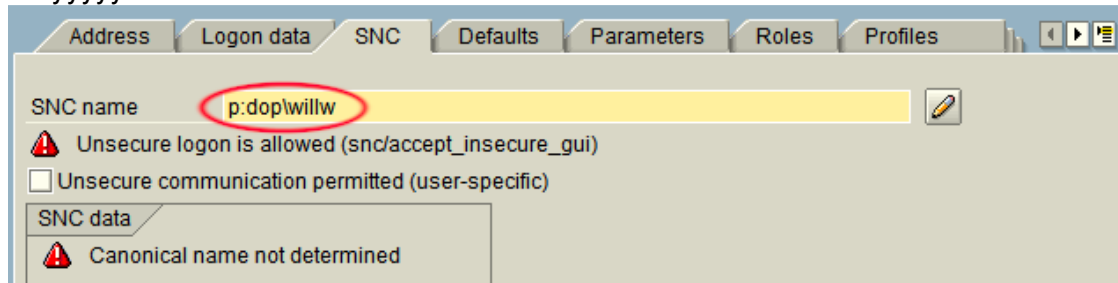
11. Save 💾 the account

If NOT using Single Sign On (SSO) you are done. If you ARE using SSO continue to step 14.
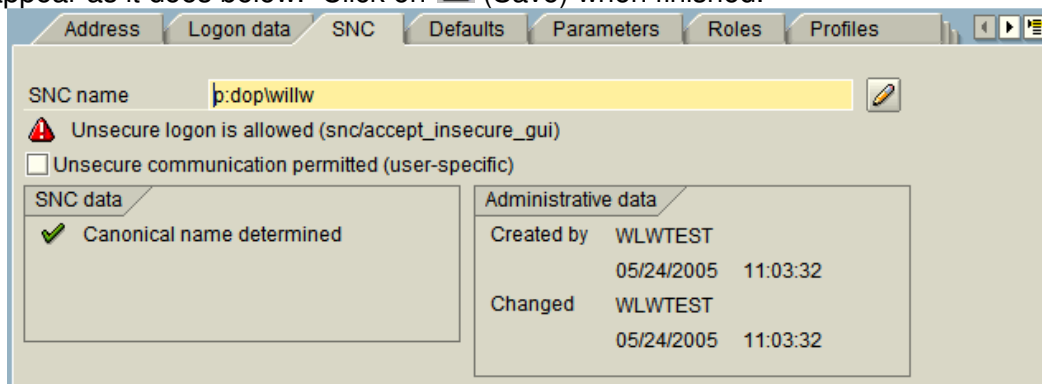
Single Sign On (SSO)

12. Click the "SNC' tab. Enter the SNC name in the following format 'p:xxx\yyyy' (see example below).
    ▪ xxx = 3 letter agency code
    ▪ yyyyy = user network id

13. If the update is successful, a green check mark and the message "Canonical name determined" will appear as it does below. Click on 🖫 (Save) when finished.

HCM UserID Maintenance

Reset HCM Password (SU01)

1. Enter transaction '**SU01**' (/nSU01) to reset the password

2. Enter the UserID for which you are re-setting the password.
    a. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) into the 'User' field. In this example it is '11111111'. To search for the User, click on 🗗 to search and select the User.

NOTE: *Users will not be unlocked by resetting the password so always check if the user is locked by clicking on the* 🔒 *Lock button. Unlock the user if needed.*

    b. Click on 🖉 to Change Password or Shift + F8

User Maintenance: Initial Screen
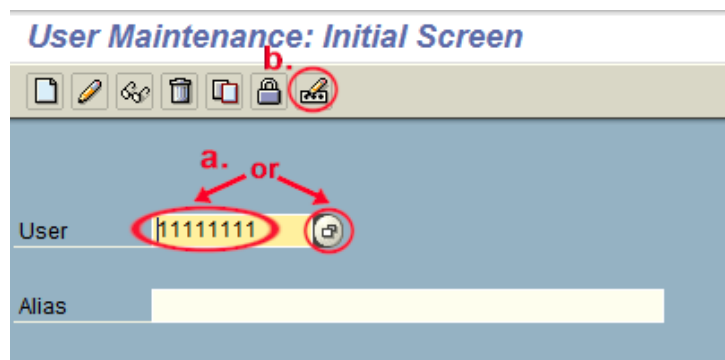
3. Enter the new password **Manually**
   a. Enter the new password and repeat for verification (Hardened password standards apply; passwords must contain at least one letter, one number, one special character and be at least eight characters long)
   b. Click on ✓ to Continue
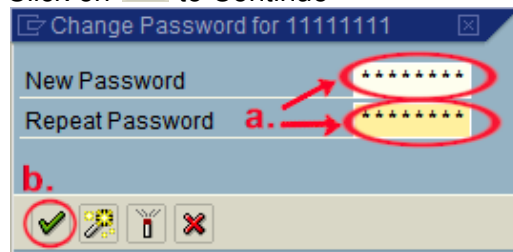
4. Upon successful update the following message will be displayed. Notify User of new password.
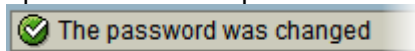
Lock/Unlock HCM UserID (SU01)

1. Enter transaction '**SU01**' (/nSU01) to lock or unlock a UserID

2. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) that needs to be locked or unlocked into the 'User' field. In this example it is '11111111'. Click the 🔒 'Lock/Unlock' button.

User Maintenance: Initial Screen
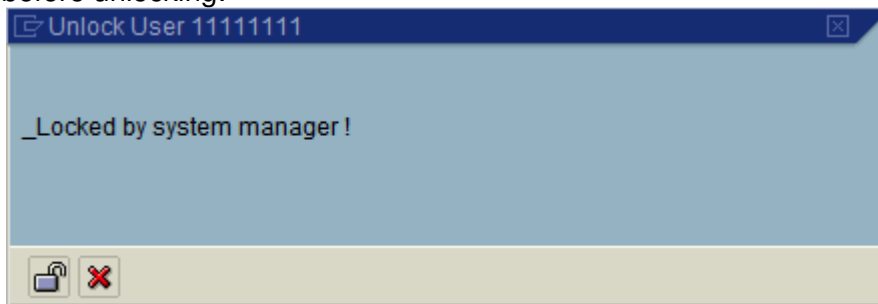
User	11111111
Alias	

3. A screen indicating the Lock Status of the User will appear.
   a. If the user is 'Not Locked':
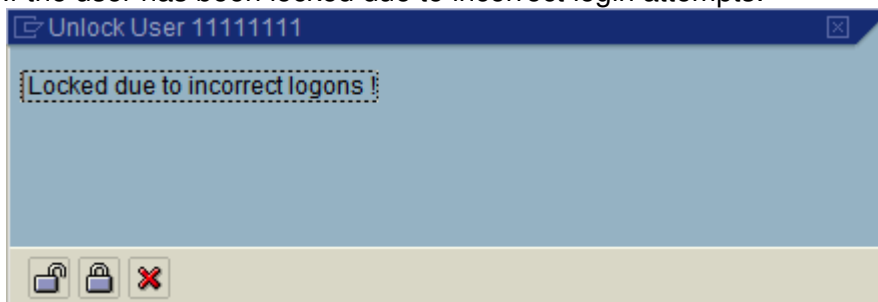
   Lock User TEST_USER

   Not locked.

   b. If the user has been locked by the System Manager, there may be a specific reason, research before unlocking:

   Unlock User 11111111

   _Locked by system manager !

   c. If the user has been locked due to incorrect login attempts:

   Unlock User 11111111

   Locked due to incorrect logons !

4. To LOCK the user, click the 🔒 'Lock' button. The User is now locked.
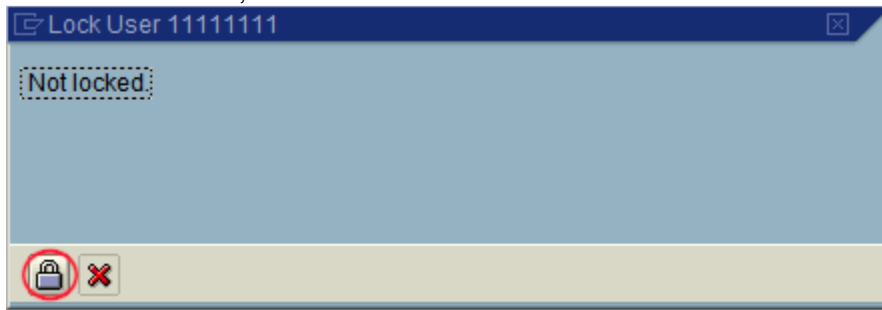
5. To UNLOCK the user, click the 🔓 'Unlock' button. The User is now unlocked.
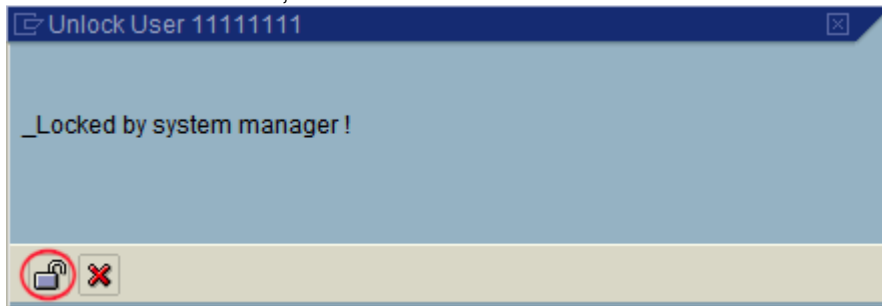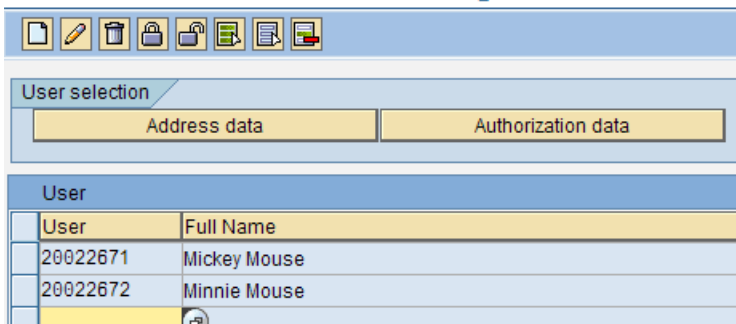
Mass HCM UserID Lock/Unlock (SU10)

There are many options for Mass User Maintenance, including locking of UserIDs, changing Parameters and/or Defaults, etc.

1. Enter transaction '**SU10**' (/nSU10) to lock or unlock multiple UserIDs

2. Select the Users to be Unlocked.
   Option 1 – Enter the users manually
   a. Enter the UserIDs (8 digit personnel number ***including*** leading zeroes) manually into the User Field
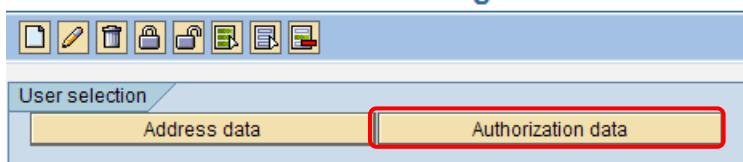
   b. Click the Lock 🔒 or Unlock 🔓 button, depending on whether you need to lock or unlock the users.

Option 2 – Select Users from a list

a. Click on the Authorization data button
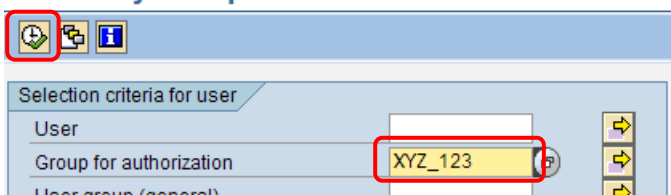
User Maintenance: Mass Changes Initial Screen

User selection

| Address data | Authorization data |
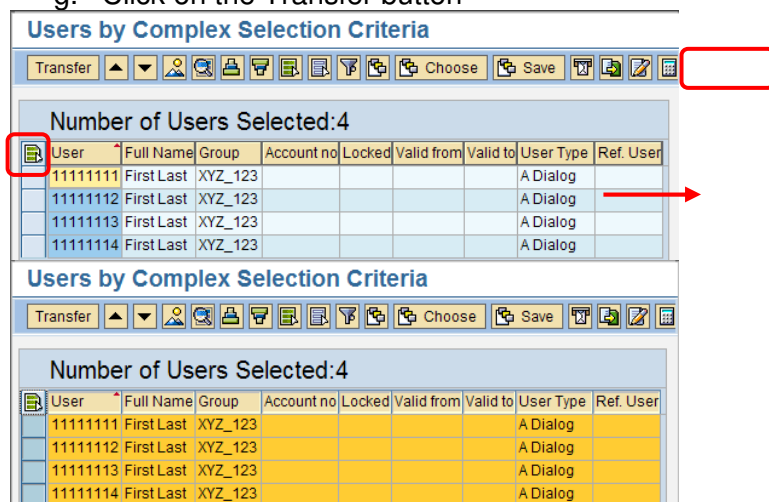
b. Search on the User Group (like WA_1110). You can also search using any of the other options to refine the results.

c. Enter the '*Group for Authorization*', in this example it is XYZ_123. This would be your specific Agency's User Group.

d. Click on ⊕ to execute the search.

Users by Complex Selection Criteria

Selection criteria for user

User		
Group for authorization	XYZ_123	
User group (general)		

e. Select and Transfer the Users to update

f. Click on the 🔳 (Select All button) or select individual users

g. Click on the Transfer button

Users by Complex Selection Criteria

Transfer

Number of Users Selected:4

User	Full Name	Group	Account no	Locked	Valid from	Valid to	User Type	Ref. User
11111111	First Last	XYZ_123					A Dialog	
11111112	First Last	XYZ_123					A Dialog	
11111113	First Last	XYZ_123					A Dialog	
11111114	First Last	XYZ_123					A Dialog	

Users by Complex Selection Criteria

Transfer

Number of Users Selected:4

User	Full Name	Group	Account no	Locked	Valid from	Valid to	User Type	Ref. User
11111111	First Last	XYZ_123					A Dialog	
11111112	First Last	XYZ_123					A Dialog	
11111113	First Last	XYZ_123					A Dialog	
11111114	First Last	XYZ_123					A Dialog	

h. To LOCK Selected Users

1. Click on 🔒 to Lock all the Users selected

User Maintenance: Mass Changes Initial Screen

User selection

| Address data | Authorization data |

User	Full Name
11111111	First Last
11111112	First Last
11111113	First Last
11111114	First Last
11111115	First Last

2. A log screen similar to the one below will appear. Click on the Expand button ▷ ; the expanded view will give a detailed log of each user that was locked

Log Display

| Overview	Jumbe
☐ Mass user changes	1
☐ System: HRD Client: 700	1
☐ Executed by: First Last (USERID)	1
▷ ☐ Date: 07/07/2009, time 16:33:50.	8

i. To UNLOCK Selected Users

1. Click on 🔓 to Unlock all the Users selected

User Maintenance: Mass Changes Initial Screen

User selection

Address data	Authorization data

| User	Full Name
11111111	🔓st Last
11111112	First Last
11111113	First Last
11111114	First Last
11111115	First Last

2. A log screen similar to the one below will appear. Click on the Expand button ▷ ; the expanded view will give a detailed log of each user that was unlocked

Log Display

Overview	Jumbe
☐ Mass user changes	1
☐ System: HRD Client: 700	1
☐ Executed by: First Last (USERID)	1
▷ ☐ Date: 07/07/2009, time 16:33:50.	8

Non-Professional Users (ESS Users) Leave State Employment – Employee Status is Withdrawn:

NOTE: *DOP recommends to keep the SU01 UserID account for withdrawn employees for at least 30 days after the termination of state employment. This account gives the user the authorizations to see their earnings statement in the Portal.*

HCM:
1. Login to HCM – HRMS Production (RP0) – through the SAP Logon Pad
2. Verify the employee is withdrawn
    1. Enter transaction PA20
    2. Enter employee's personnel number
    3. Click the Overview button
    4. Check the Status: Withdrawn

Name				
PersArea	4650 Parks/Recreation Comm		EEGroup H Non-Perm. Limited	
PSubarea	0001 Non Represented	EESubgroup 05 H-OT Elig>40hrs/w	Status	Withdrawn

3. Enter transaction '**SU01**' (/nSU01)
4. Enter the UserID (Personnel Number, *including* leading zeroes) into the 'User' field.
5. Click the Display button to verify the user
6. Click on the Back button to go back to the User Maintenance screen
7. Click the Delete button and delete the account.

NOTE: *Portal User Administrator needs to delete personnel number UserID from the Portal.*

Professional Users Transfer out of the Agency or
Professional Users Become Non-Professional Users (ESS Users):

HCM:
1. Login to HCM – HRMS Production (RP0) – through the SAP Logon Pad

If the employee's employment status is **active or inactive (PA20)**, *and no longer in your agency*

2. Verify the employee status is active/inactive
    1. Enter transaction PA20
    2. Enter employee's personnel number
    3. Click the Overview button
    4. Check the Status: Active or Inactive

Name				
PersArea	1000 Attorney General		EEGroup B Civil Service Exempt	
PSubarea	0001 Non Represented	EESubgroup 01 Monthly(M) OT Exem	Status	Active

Name				
PersArea	2450 Military Department		EEGroup 0 Permanent	
PSubarea	0001 Non Represented	EESubgroup 01 Monthly(M) OT Exem	Status	Inactive

3. Enter transaction '**OOSB**' to remove the authorization (/nOOSB).
    a. Click the "Position" button at the bottom of the screen and enter the eight digit UserID in the User name field and click the green check mark. That will position the list to the selected UserID

Change View "User Authorizations": Overview

User name	Auth.profile	Start date	End date	Exclusion	Display
Z_WSPTEST	WA_2250	03/30/2006	12/31/9999	☐	
Z_WSPTESTBW	WA_2250	03/30/2006	12/31/9999	☐	

Another entry

User name
Auth.profile
Start date

Position...   Entry 3,180 of 3,189

b. Click the box to the left of the UserID

c. Click [icon] to delete the entry. Repeat for all entries for this UserID that are associated with the user's access in **your** agency/personnel area.

Change View "User Authorizations": Overview

User name	Auth.profile	Start date	End date	Exclusion	Di
Z_DOTTESTBW	WA_405A	05/31/2008	12/31/9999	☐	
Z_DOTTESTBW1	WA_405A	05/31/2008	12/31/9999	☐	
Z_DSHSTEST	30000	05/03/2007	12/31/9999	☐	
Z_FINAPPROV	ALL	03/01/2006	12/31/9999	☐	
Z_FINRPTPROC	WA_1110	02/08/2006	12/31/9999	☐	

You will see [✓ Number of deleted entries: 1] in the status area.

d. Click the Save button [icon] to save the table.

4. Enter transaction '**SU01**' (/nSU01) to update the UserID.
5. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) into the 'User' field.
6. Click on the Display button [icon], and verify the user.
7. In the Logon Data tab; Click on Display/Change button [icon] to enter the edit mode.
8. Change the UserGroup back to ESSUSER.

User Group for Authorization Check
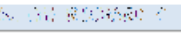
User group   ESSUSER   User group for ESS user

9. Click on Save button [icon] to save the account.

If the employee's employment status is **withdrawn (PA20)**

1. Verify the employee is Withdrawn
   a. Enter transaction PA20
   b. Enter employee's personnel number

c. Click the Overview button
d. Check the Status: Withdrawn

Name	
PersArea	4650 Parks/Recreation Comm EEGroup H Non-Perm. Limited
PSubarea	0001 Non Represented EESubgroup 05 H-OT Elig>40hrs/wk Status Withdrawn

2. Remove OOSB entries (See above for instructions)

NOTE: *DOP recommends to keep the SU01 UserID account for withdrawn employees for at least 30 days after the termination of state employment. This account gives the user the authorizations to see their earnings statement in the Portal.*

3. Enter transaction '**SU01**' (/nSU01)
4. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) into the 'User' field.
5. Click the Display button to verify the user.
6. Click on the Back button to go back to the User Maintenance screen.
7. Click the Delete button and delete the account.

NOTE: *BI, E-Recruiting and Portal User Administrators need to do clean up on these professional user accounts if the users had access to those systems.*

Employee has a Name Change
NOTE: *When an employee has a name change and the HCM personnel master record is updated, this change does not update the UserID account (SU01) for that employee in HCM. The Agency User Administrator must manually go into SU01 and change employee's name.*

1. Enter transaction SU01
2. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) into the 'User' field.
3. Click the Display button to verify the user.
4. Click on the Display/Change button to enter the edit mode.

Address	Logon data	SNC	Defaults	Parameters	Roles	Profiles

Person	
Title	
Last name	Doe
First name	Jane
Academic Title	
Format	Jane Doe

5. Change Last and/or First name

Address	Logon data	SNC	Defaults	Parameters	Roles	Profiles

| Person	
Title	
Last name	Jackson
First name	Jane

6. Click on Save to save the account.

HCM Security Auditor
SR3P_XXXX_SECURITY_AUDIT

Display Users by Role (SUIM)

1. Enter transaction '**SUIM**' (/nSUIM) to Display Users by Role

2. Display Users for a Specific Role

3. From the User Information System screen, drill down to Roles > By Role Name and click on ![icon] to Execute.
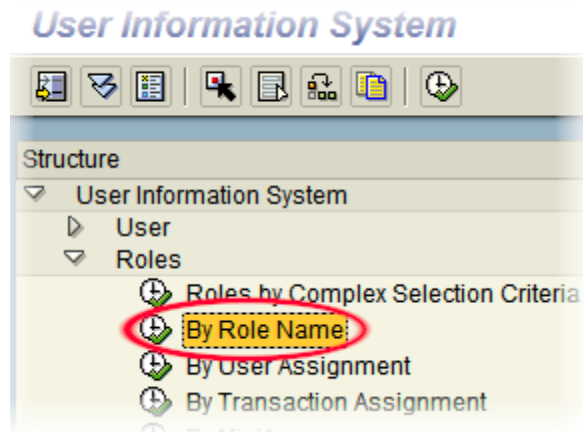

4. Enter the role name (or search if you don't know it) and click on ![icon] to Execute. To search for the Role, enter SR3P* in the Role field and click on ![icon] to search.
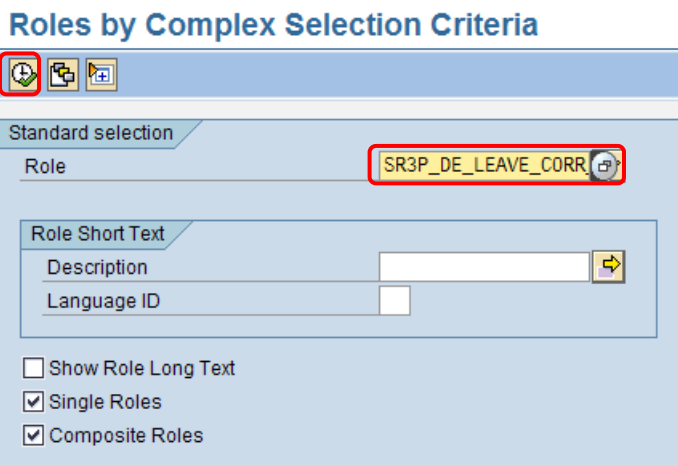
5. From the Roles by Complex Selection Criteria screen, select ![icon] User Assignment to display all users assigned to the selected role.
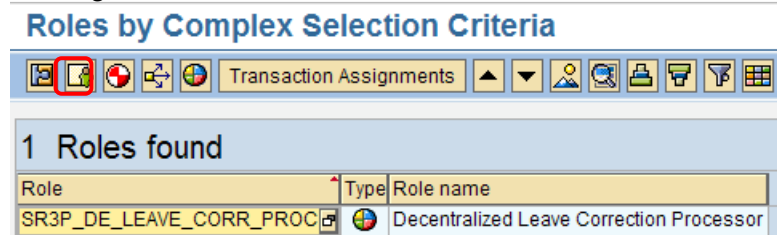
6. A list of Users will be generated.

Roles by Complex Selection Criteria

Roles	Profiles	Change documents				File...		

Number of Users Selected:345

User	Complete name	User group	Account no.	Locked	Valid from	Valid through	User Type	Ref. User
〄♁☐	U ♁ Pe♁t	WA_4950	WA_4950				A Dialog	
♁♁♁♁	♁♁♁ ♁♁♁♁	WA_♁♁50	WA_♁♁50				A Dialog	

7. To download the results to Excel, Click on List > Export > Spreadsheet

List	Edit	Goto	User	Settings	System	Help
Print		Shift+F1				
Export		►	Word processing...		Shift+F5	
Send...		Shift+F8	Spreadsheet...		Shift+F4	
Exit		Shift+F3	File...		F9	
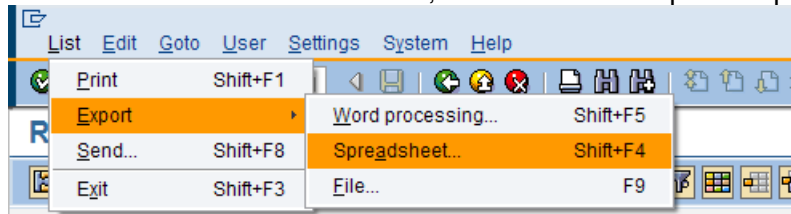
8. Choose All Available Formats → Excel (In Existing XXL Format) and Click on ✔ to continue

Select Spreadsheet

Formats:
- ○ Excel (in MHTML Format)
- ○ Star Office 8 Calc / OpenOffice.org 2.0 Calc
- ⊙ All Available Formats
  - [Excel (In Existing XXL Format)]

☐ Always Use Selected Format

✔ ✖

9. Click on ✔ to continue

Information

ⓘ Filter criteria, sorting, totals and subtotals are
    not taken into account

✔ ❓
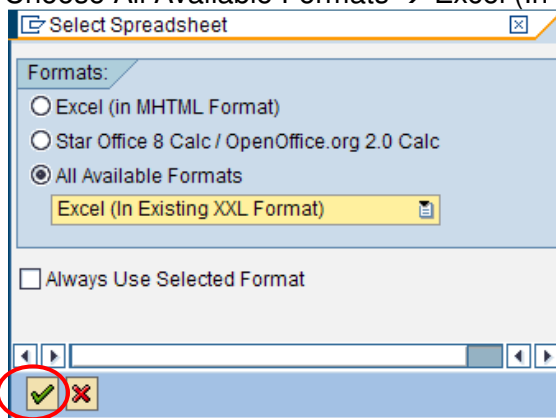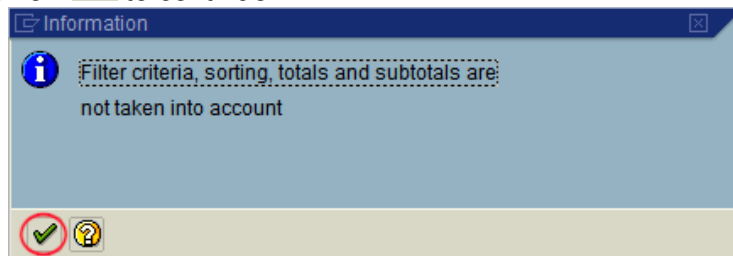
10. Click on Table and ✔ to continue

Export list object to XXL

An XXL list object is exported with
280 lines and 9 columns
Choose a processing mode:

- ⊙ Table
- ○ Pivot table

✔ ✖
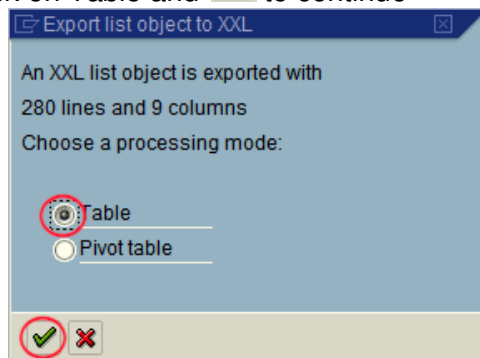
11. Click on ✔ to continue
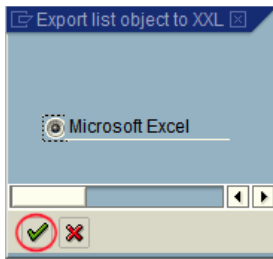
12. Excel will open and display the data.
13. Save the spreadsheet on your computer.

Display Role Assignments for all Users (SUIM)

1. Enter transaction SUIM
2. From the User Information System screen, drill down to User > Users by Complex Selection Criteria

> Users by Complex Selection Criteria and click on
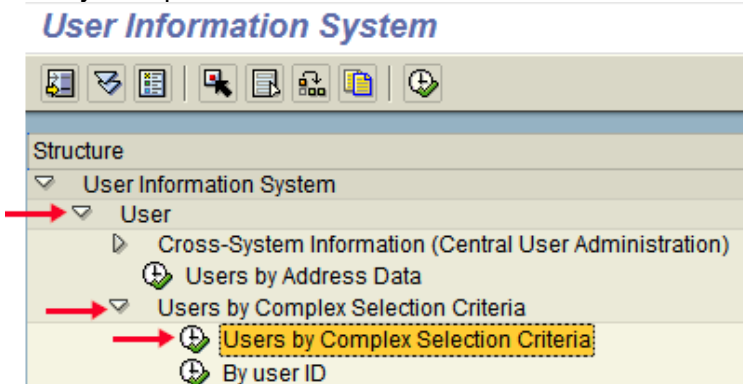
3. Leave all fields blank and click on to execute the report
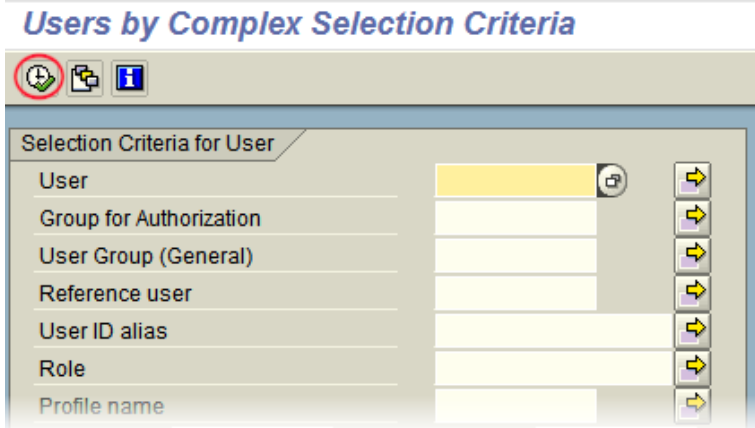
4. The list returned should contain all UserID within the agency. Click on the 🌐 Roles (Roles) button to display all roles assigned to the user.

User Name	Complete name	User group	Account no.	Locked	Valid from	Valid through
		BW				
		ROLLED_OFF		🔒		
		ROLLED_OFF		🔒		
		BW				
		ROLLED_OFF				

5. The report will be displayed. To download the results to Excel see the steps 7 – 13 in the Display Users by Role above.

Display Transactions by Role (SUIM)

1. Enter transaction '**SUIM**' (/nSUIM) to Display Transactions by Role
2. From the User Information System screen, drill down to Roles > By Transaction Assignment and click on [icon] to Execute.
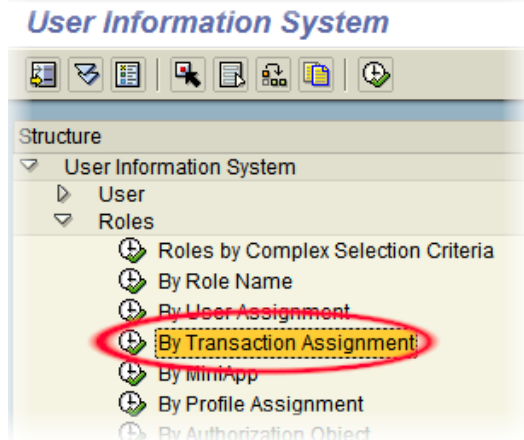
3. Enter the transaction (or search if you don't know it) and click on [icon] to Execute.
   NOTE: *Single or multiple transactions can be entered here.*
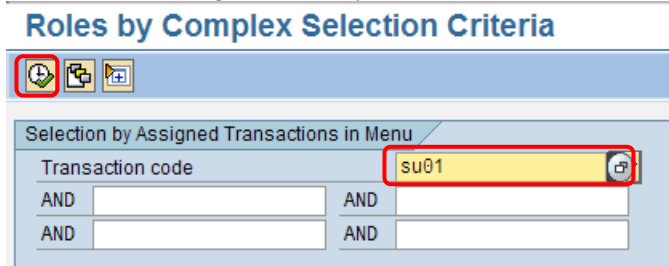
4. A list of Transactions by Roles will be generated.
   NOTE: *You can view User Assignment by selecting a role and the User assignment button.*

Display Role Information (PFCG)

> **NOTE:** *To see transaction codes in the User Menu click on Extras → Settings, check the Display Technical Names check box and click the green checkmark button.*

1. Enter transaction '**PFCG**' (n/PCFG) or select 'Role Maintenance' from the main menu.

   SAP Easy Access - User menu for

   - Maintain Users Own Data
   - Evaluate Authorization Check
   - Display HR Master Data
   - ERP PAYROLLlaunch Suite
   - Logged Changes in Infotype Data
   - Display Infotypes According to DDic
   - Role Maintenance
   - User Information System
   - Tools
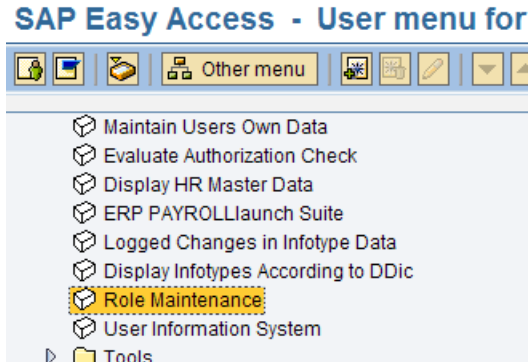
2. Enter the Role Name (or search for possible values) and click on [icon] to Display

   Role Maintenance

   Transactions

   | Role | SR3P_CE_BENF_CONFIG_ANL |
   | Name | Centralized Benefits Configuration Analyst |
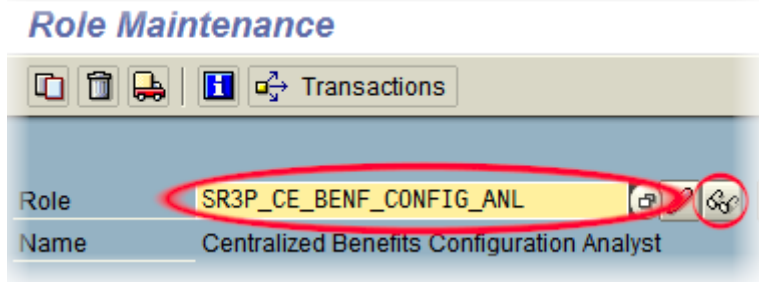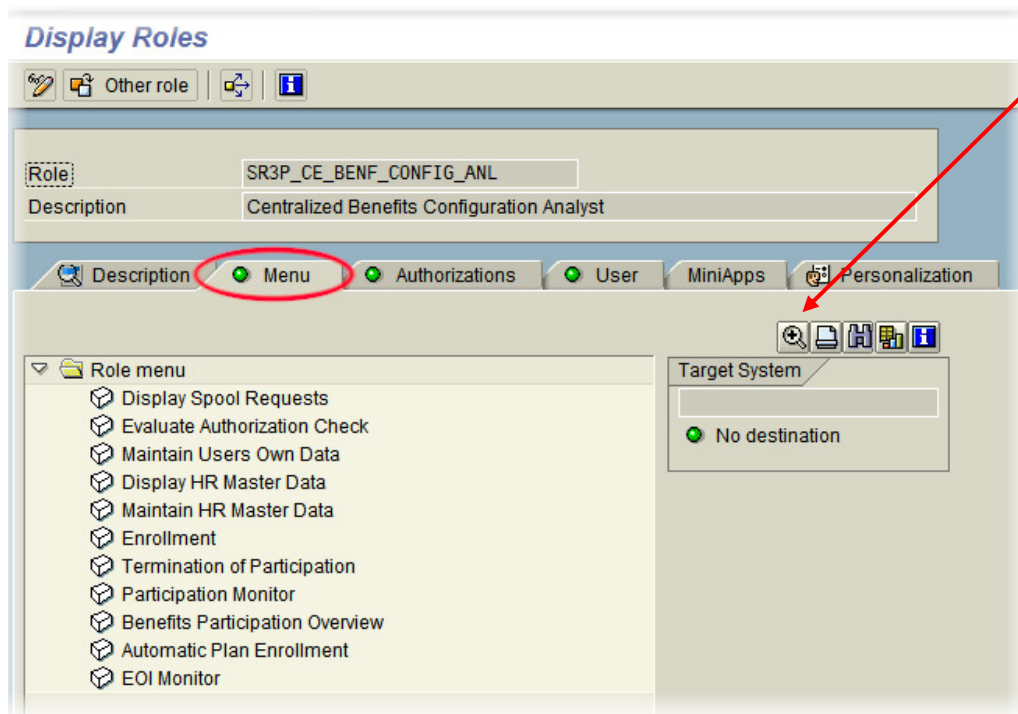
3. The first tab is Description; it will list who created it, last changed and a description.

   Display Roles

   Other role

   | Role | SR3P_CE_BENF_CONFIG_ANL |
   | Description | Centralized Benefits Configuration Analyst |

   Description | Menu | Authorizations | User | MiniApps | Personalization

   Administration Information

	Created	Changed
User	AMYL	AMYL
Date	14.10.2004	01.11.2004
Time	15:18:53	15:50:43

   Transaction Inheritance

   Derive from Role

   Delete inheritance relationships

   The Benefits Configuration Analyst role is responsible for creating and maintaining retirement plans in HRMS
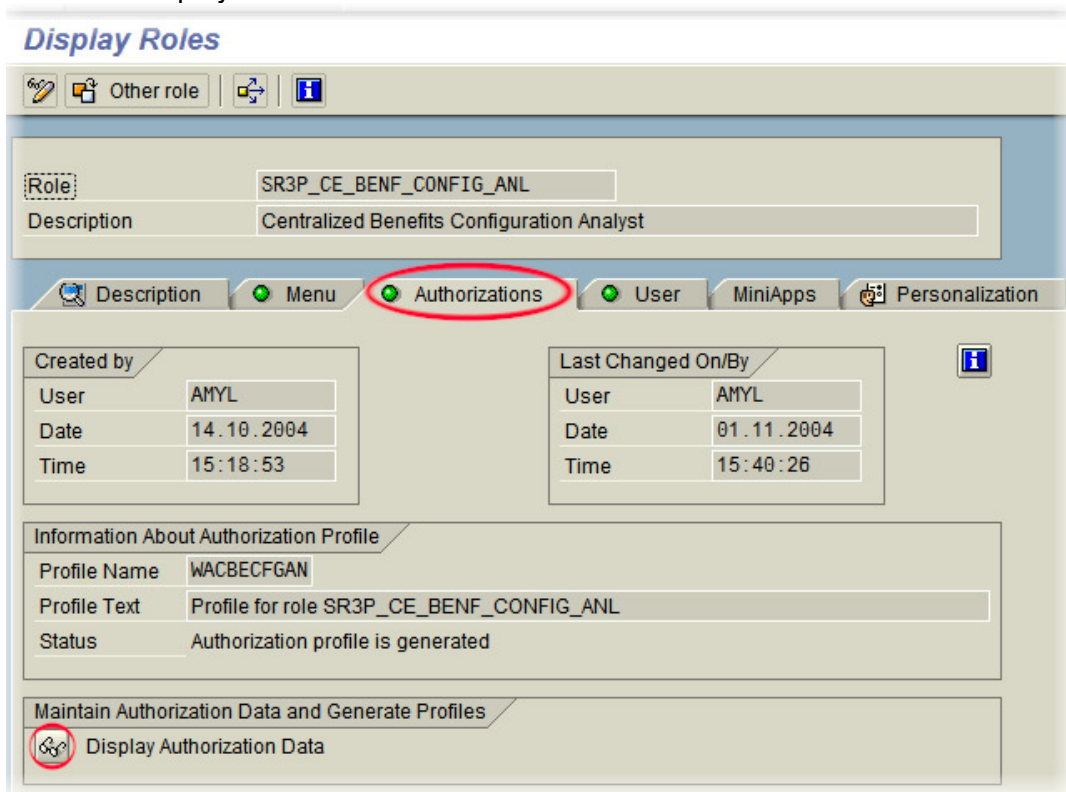
4. The second tab is Menu; this shows transactions available via the menu system for this role.
   **NOTE:** *To see transaction codes in this view click on the 'Switch on technical names'* button.

5. The third tab is Authorizations: this additional information about the authorizations for the role. Click on ![icon] to Display Authorization Data for the role.

6. In the Display role: Authorizations screen, expand the node to view specific authorizations. When finished, click on Back(F3) ⬅ to return to the Display Roles screen.

Display role: Authorizations

Maint.:   0 Unmaint. org. levels   0 open fields,   Status: Unchanged

SR3P_CE_BENF_CONFIG_ANL   ●●● Centralized Benefits Configuration Analyst

    ⊞ ●●● Standard   Cross-application Authorization Objects
    ⊞ ●●● Maintained Basis: Administration
    ⊟ ●●● Changed   Human Resources

        ⊞ ●●● 👤 Standard   Personnel Planning
        ⊟ ●●● 👤 Changed   HR: Master Data

            ⊟ ●●● Changed   HR: Master Data
                🔧 Authorization level   M, R
                🔧 Infotype   0000, 0001, 0169, 0171
                🔧 Personnel Area   *
                🔧 Employee Group   *
                🔧 Employee Subgroup   *
                🔧 Subtype   *
                🔧 Organizational Key   *

        ⊞ ●●● 👤 Standard   HR: Clusters
        ⊞ ●●● 👤 Maintained HR: Master Data - Personnel Number Check

7. The fourth tab is User; this will list users assigned to the role. Direct assignments are noted in Black, Indirect (position based) assignments are shown in Blue.
    NOTE: *The roles should always be assigned to positions.*

Display Roles

✏ 📇 Other role | 🔁 | ℹ

| Role | SR3P_CE_BENF_CONFIG_ANL |
| Description | Centralized Benefits Configuration Analyst |

Description | Menu | Authorizations | **User** | MiniApps | Personalization

🔧   ● User comparison ℹ

User ID	User name	From	to	.
3_BENFCONFIG	3_BENFCONFIG	03.11.2004	31.12.9999	▲
8_BENFCONFIG	8_BENFCONFIG	03.11.2004	31.12.9999	▼
9_BENFCONFIG	9_BENFCONFIG	03.11.2004	31.12.9999	
TESTID1	testid1	06.12.2004	31.12.9999	

8. The fifth tab is MiniApps and the sixth tab is Personalization. At this time, disregard these tabs.

MiniApps   Personalization

Display List of Infotypes (S_ALR_87101323)

1. Enter transaction '**S_ALR_87101323**' (n/S_ALR_87101323) or select 'Display Infotypes According to DDic' from the main menu.

SAP Easy Access - User menu for

- Evaluate Authorization Check
- Display HR Master Data
- ERP PAYROLLlaunch Suite
- Logged Changes in Infotype Data
- Display Infotypes According to DDic
- Role Maintenance
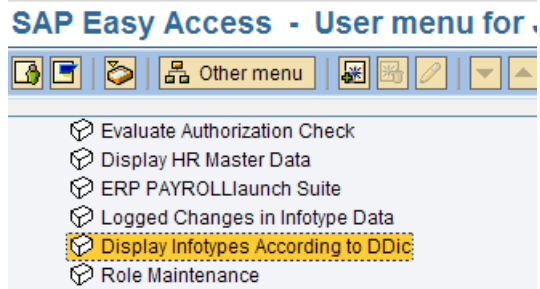
2. Enter the Info Type (* to view all, or specific value) and click on ⏰ to Execute.

Display Infotypes with Data Dictionary Structures

Requested infotype   *
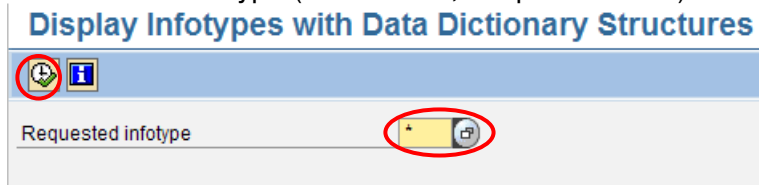
3. A list of Info Types will be generated.

Display Infotypes with Data Dictionary Structures

| Infotype table | Infotype structure |

Infotype text

```
0000    HR Master Record: Infotype 0000 (Actions)
0001    HR Master Record: Infotype 0001 (Org. Assignment)
0001    HR Master Record: Infotype 0001 (Org. Assignment)
0002    HR Master Record: Infotype 0002 (Personal Data)
0003    HR Master Record: Infotype 0003 (Payroll Status)
0003    Additional Query Fields
0004    Additional Query Fields
0005    HR Master Record: Infotype 0005 (Leave Entitlement)
0005    Additional Query Fields
0006    HR Master Record: Infotype 0001 (Org. Assignment)
0008    HR Master Record: Infotype 0008 (Basic Pay)
0009    Additional Query Fields
0011    HR Master Record: Infotype 0011 (Ext.Bank Transfers)
0012    HR Master Record: Infotype 0012 (Fiscal Data - Germany)
0012    Additional Query Fields
0013    Additional Query Fields
0014    HR Master Record: Infotype 0014 (Recur. Payments/Deds.)
0014    Additional Query Fields
```

Display Changes in Infotype Data (S_AHR_61016380)

1. Enter transaction '**S_AHR_61016380**' (n/S_AHR_61016380) or select 'Logged Changes in Infotype Data' from the main menu.
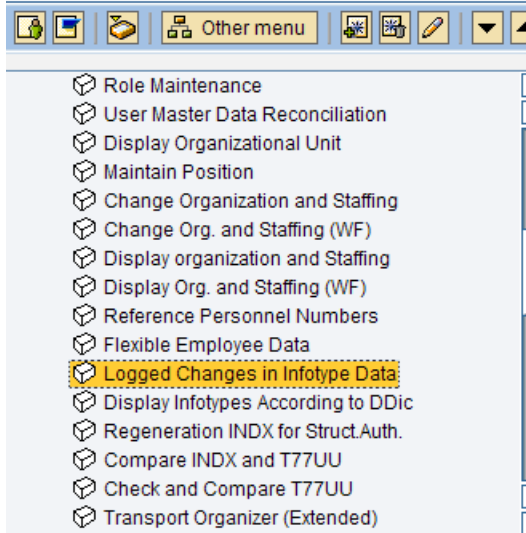
2. Select Long-term documents and enter InfoType to search on and click on to Execute. Additionally, you can enter a range of InfoTypes and Changed dates.

3. A list of Changes in Infotype Data will be generated.

Display User Assignments (ZAUTH_DSP_USR_ASSIGN)

1. Enter transaction '**ZAUTH_DSP_USR_ASSIGN**' (/nZAUTH_DSP_USR_ASSIGN) or select 'Display User Assignments' from the main menu.
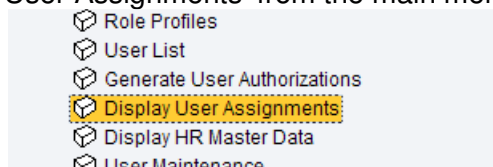
2. Display Roles and Profiles assigned to User
   a. Enter the UserID into the 'User Name' field. The UserID should be the user's Personnel Number, *including* leading zeroes. In this example it is '11111111'. To search for the User, click on to search and select the User.
   b. Select Roles and Standard Profiles
   c. Select P_ORIGIN (HR: Master Data)
   d. Click on to Execute.

e. The report will display Roles and Profiles assigned to the User selected.

Roles and StandardProfiles

User Name 11111111

	Role	Profile	Start date	End Date
Related Roles in OM (Relationship 007)				
Standard Profiles in OM (IT 1016)				
Roles in User MasterRec	SR3P_DE_PAY_INQ		07/08/2009	12/31/9999
	SR3P_DE_PERS_ADMIN_INQ		07/08/2009	12/31/9999
	SR3P_DE_T&A_INQ		07/08/2009	12/31/9999
Standard Profiles in UserMastRec		WADPADMINQ		
		WADPAYINQ_		
		WADT&AINQ_		

3. Click the Back button [image] to go back to previous screen.
4. Display HR Authorizations by Authorization Object
    a. Enter the UserID into the 'User Name' field. The UserID should be the user's Personnel Number, **including** leading zeroes. In this example it is '11111111'. To search for the User, click on [image] to search and select the User.
    b. Select Display HR Authorizations
    c. Select P_ORIGIN (HR: Master Data)
    d. Click on [image] to Execute.

Display User Assignments

d. ⊕ ⓘ ≡ Display Authorization Switch | 👥 Assigned Persons (Infotype 0105)

User

a.
User Name | 11111111

Assignments

- ○ Related Organizational Units
- ○ Structural Profiles
- ○ Roles and Standard Profiles
- **b.** ◉ Display HR Authorizations
- **c.** ☑ P_ORGIN (HR: Master Data)
- ☐ P_ORGXX (HR: Master Data - Extended Check)
- ☐ P_ORGINCON (HR: Master Data with Context)
- ☐ P_ORGXXCON (HR: Master Data - Extended Check with Context)
- ☐ P_PERNR (HR: Master Data - Personnel Number Check)
- ☐ P_ABAP (HR: Reporting)
- ☐ PLOG (Personnel Planning)

e. The report will display authorizations assigned to the User selected.

Display User Assignments

Authorizations by Authorization Object

User Name 11111111

Object	Authorization	Field Name	Authorization Value	Authorization Value
P_ORGIN	WADPADMIN...	INFTY	0128	
P_ORGIN	WADPADMIN...	INFTY	0165	
P_ORGIN	WADPADMIN...	INFTY	0167	0171
P_ORGIN	WADPADMIN...	INFTY	0207	0210
P_ORGIN	WADPADMIN...	INFTY	0234	0236
P_ORGIN	WADPADMIN...	INFTY	0302	

BI (Business Intelligence) ZS_BI_XXXX_USER_ADMIN

Introduction
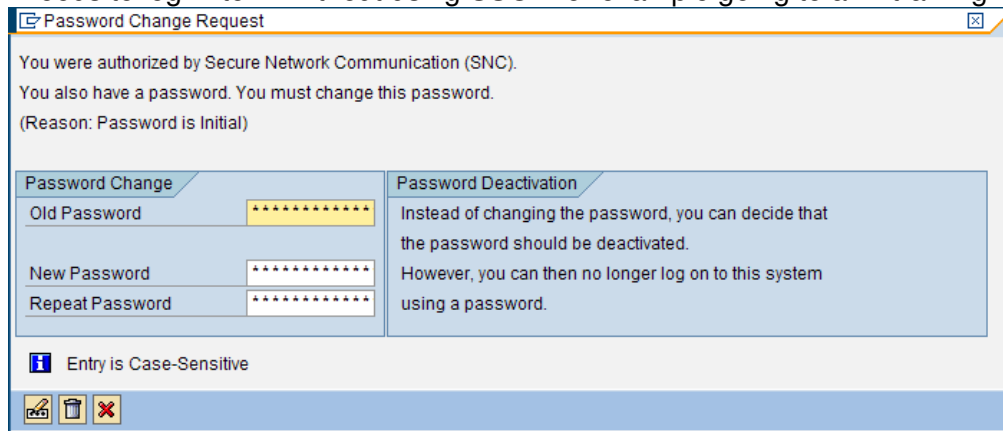
All BI Users must first have an HCM Authorization Profile assigned through the OOSB (Table T77UA). BI UserIDs will have access to retrieve data on the next business day following the creation of their UserID and role assignment(s).

There are two types of BI Reporting Users:

- END_USER: This type of user will retrieve data from BI through the HRMS Portal *or*
- POWER_USER: This type of user will retrieve data directly through BI

BI Users will need UserID & password to display query results on the web (execute WBWT template).

When SSO users login to BI for the first time the system will ask the user to either change the initial password or deactivate it. Our recommendation is **to change the password** and keep a note of it, in case the user needs to log in to BI without using SSO. For example going to a BI training.

NOTE: *Changing initial BI password will **not** affect logging in to the portal using SSO with a professional LDAP account. This type of account requires the user to input their network password.*

Also, BI UserID accounts are created for:
- Access to E-Recruiting professional roles through the HRMS Portal. This information can be found in the E-Recruiting and HRMS Portal chapters of this handbook.
- Access HCM professional roles through the HRMS Portal with the use of WebGui. Information on how to assign an WebGui group role to the Portal Professional account can be found in the HRMS Portal chapter of this handbook.

Maintaining a Professional BI UserID Account

Create BI UserID (SU01)
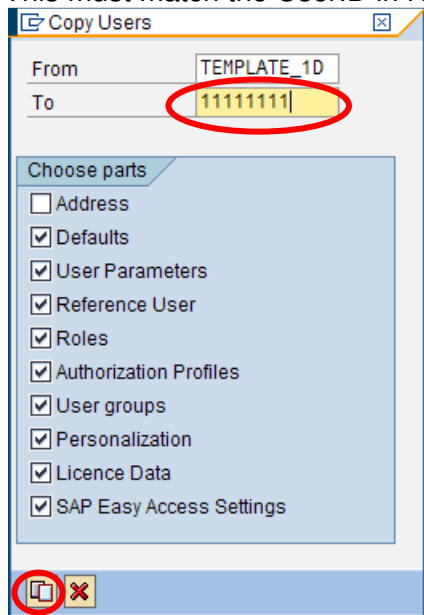
Prerequisites:
- ✓ UserID is created in HCM, has at least XXXX_Data_Profile role.
- ✓ The Authorization Profile assigned through the OOSB in HCM (not required for E-Recruiting Professional BI Users)

1. Login to the BIP environment (HRMS Business Intelligence);

2. Enter transaction '**SU01**' (/nSU01) to create BI UserID

3. Copy the model UserID "Template_1D" to create the new UserID.

    a. Enter TEMPLATE_1D in the 'User' field.

    b. Click on ⬚ to COPY the Template UserID.
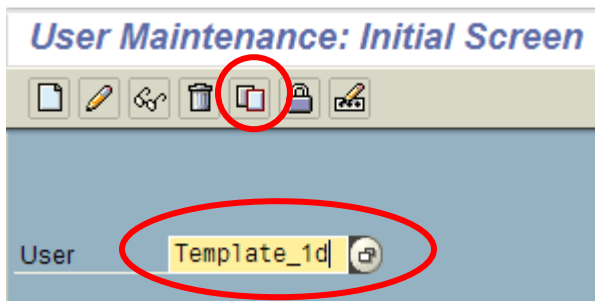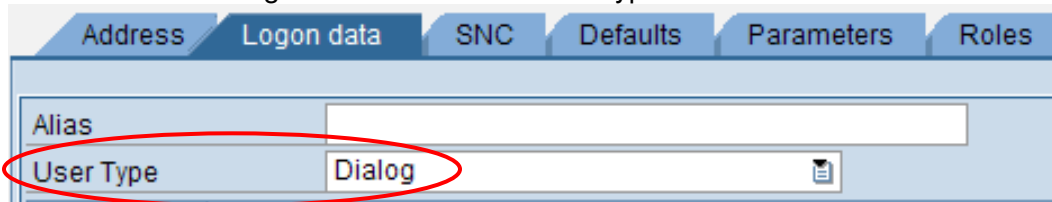
NOTE: *The TEMPLATE_1D UserID was created to assist in the creation of new UserIDs. This ID contains basic default settings that all UserIDs will need. There are several fields that will require changes after the copy is performed and before the UserID will be useable in the system.*
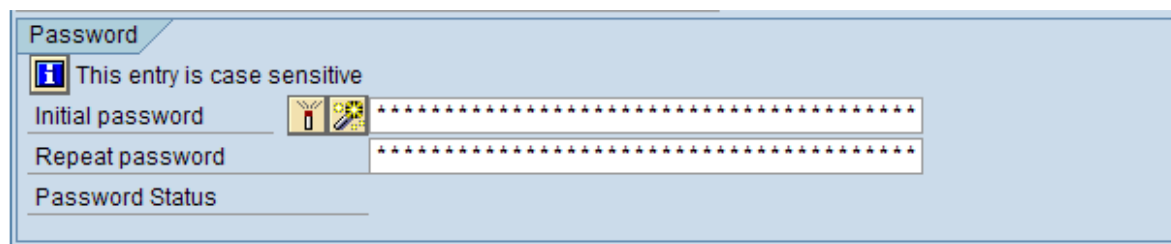
4. Enter the new UserID (Personnel number, **_including_** leading zeroes to create an eight digit UserID. This must match the UserID in HCM – HRMS Production) and click on (Copy) to continue.

5. From the 'Logon data' tab, update the following:
   a. Make sure Dialog is selected for the User Type

   b. Click in the initial password field and type in an initial password and then retype the same password in the Repeat Password field. Note that 'hardened' password standards apply (i.e. must contain at least 1 letter, 1 number and 1 special character, and must be at least 8 characters long). DO NOT click on the wizard button. This will generate a 40 digit password.

   c. Make note of the password for distribution to the BI User and to map the BI account to the HRMS Portal account if needed.

NOTE: _All BI Users will need UserID and password to display query results on the web. The (SSO) BI User should always use the SSO button on the SAP GUI logon pad._

d. Enter the User Group for your Agency. To search, click on the ⊡ button to search for your User Group.

User Group for Authorization Check

User group	WA_1110

e. Enter the valid from and valid through dates.

Validity Period

Valid from	09/10/2008
Valid through	12/31/9999

6. Select the 'Address' tab, enter user's first and last name and any other desired information and press enter when complete.

Address	Logon data	SNC	Defaults	Parameters	Roles	Profiles

Person

Title	
Last name	11111111
First name	
Academic Title	
Format	11111111
Function	
Department	
Room Number		Floor		Building	

Communication

Language		Other communication...
Telephone		Extension	
Mobile Phone	
Fax		Extension	
E-Mail	
Comm. Meth	

Assign other company address...   Assign new company address...

Company

7. Click on the 'Defaults' tab. If you did **_not_** copy this UserID from 'Template_1D', ensure the following fields are filled as shown:

Address	Logon data	SNC	Defaults	Parameters	Roles	Profiles

Start menu

Logon Language   EN
Decimal Notation   1,234,567.89
Date Format   MM/DD/YYYY
Time Format (12/24h) 24 Hour Format (Example: 12:05:10)

Spool Control

OutputDevice   LOCL
☐ Output Immediately
☐ Delete After Output

Personal Time Zone

of the User   PST
Sys. Time Zone   PST

CATT
☐ Check Indicator

If NOT using Single Sign On (SSO) you are done. If you ARE using SSO continue to step 8.

Single Sign On

8. Click the "SNC' tab. Enter the SNC name in the following format 'p:xxx\yyyy' (see example below).
    - xxx = 3 letter agency code
    - yyyyy = user network id

9.   If the update is successful, a green check mark and the message "Canonical name determined" will appear as it does below.

10. Click on (Save) when finished.

Assign Professional Roles to a BI UserID Account (SU01)

NOTE: The GENERAL ACCESS role MUST be assigned to all BI user accounts. For E-Recruiting Professional BI Users this is the only role needed in BI. For assigning multiple users, Mass UserID Maintenance (SU10) can also be used.

Roles for BI UserIDs
BI users will need the following roles:
- ZS_BI_GENERAL_ACCESS (Contains general use transactions),
- ZS_BI_XXXX_END_USER *or*
- ZS_BI_XXXX_POWER_USER (where 'XXXX' is your personnel area)
- ZS_BI_XXXX_WBWT Agency Workbook/Web template)
- ZS_BI_SOW_WBWT (State of Washington Workbook/Web template)

and one OR more of the following

- ZS_BI-FI_ANALYSIS (Access to Financial data)
- ZS_BI-HR_ANALYSIS (Access to HR data)
- ZS_BI-ER_ANALYSIS (Access to E-Recruiting data)
- ZS_BI-GR_ANALYSIS (Access to Grievance data)

Roles in BI are assigned directly to the UserID.

1. Log into BIP (HRMS Business Intelligence);

2. Enter transaction '**SU01**' (/nSU01) to Assign Role(s) to UserID(s)

3. Enter/Search for the UserID.
   a. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) into the 'User' field. In this example it is '11111111'. To search for the User, click on 🔲 to search and select the User.
   b. Click the 'Change' 🖉 button.
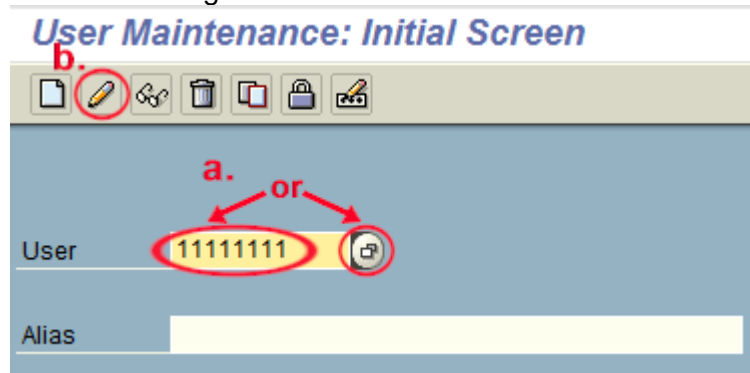
3. Click the 'Roles' tab, enter the Role name.
   a. If you know the role, type it in the first empty cell and press enter.
   b. To search for the Role, click on [icon] to search.
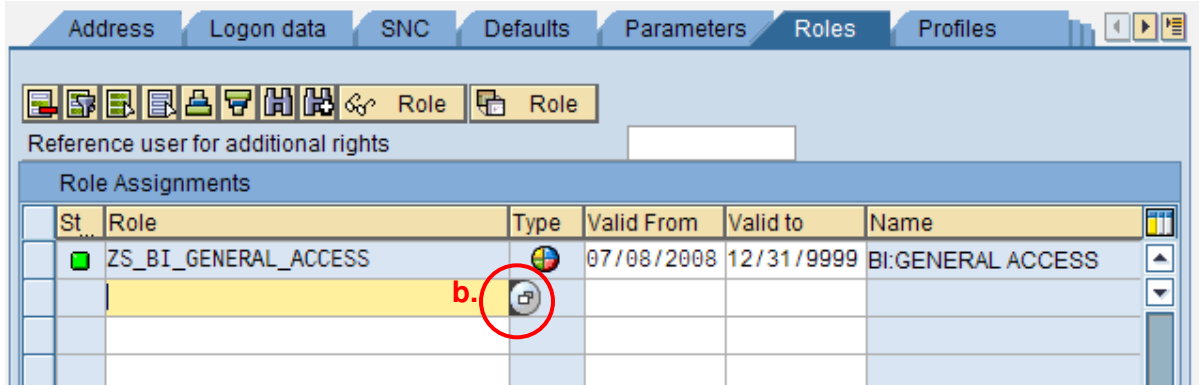
   c. Enter ZS_BI* in the 'Single Role' field
   d. Click on [checkmark] to Start Search
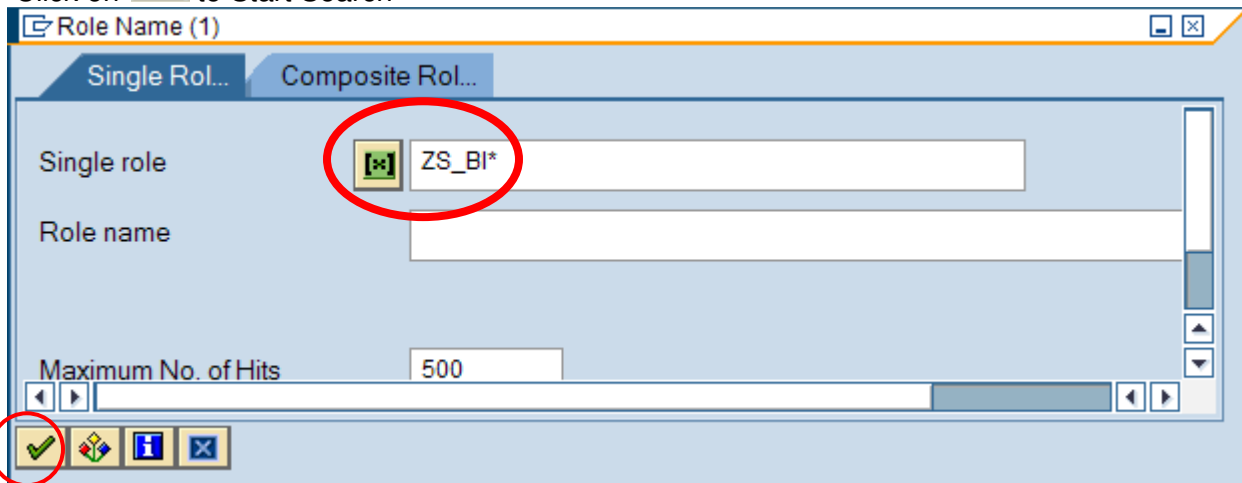
   e. Select the role(s) desired and place a checkmark in the box to the left.
   f. Click on [checkmark] to copy/continue
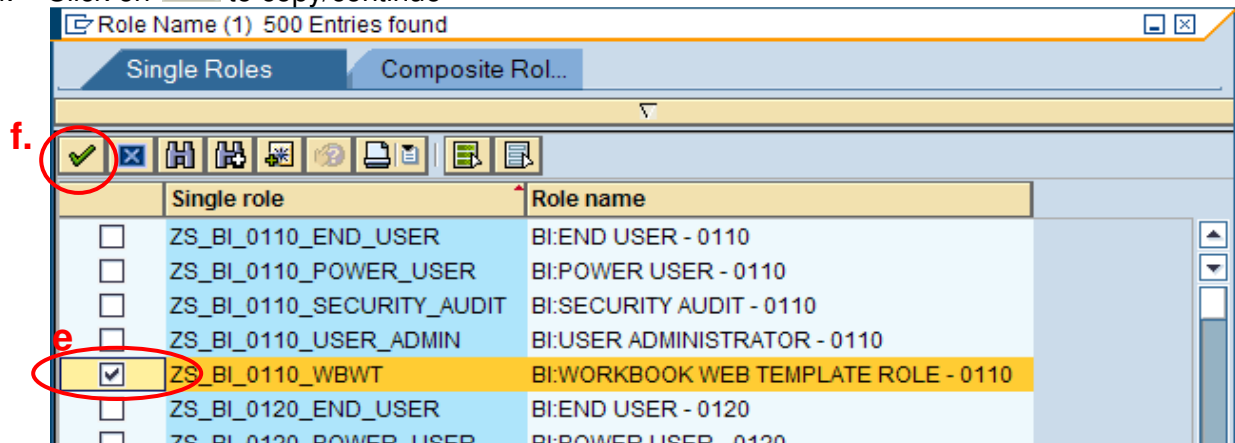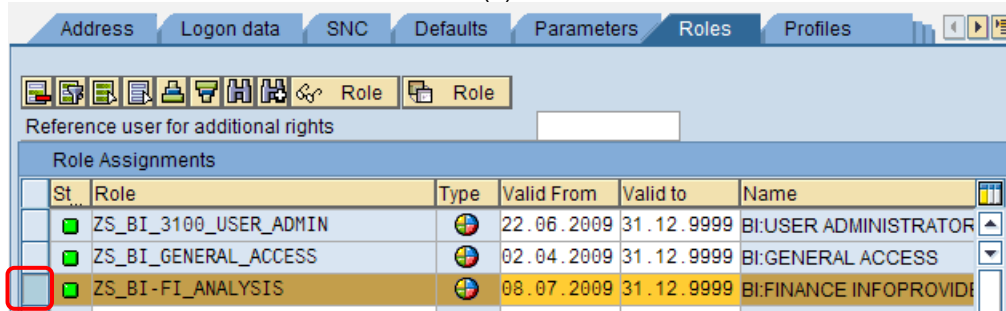
   g. Repeat as necessary to add any additional roles.

1. Close the Display Role screen.
2. Repeat from step 4 for any other roles.

Delete Professional Roles from a BI UserID Account (SU01)

1. Log in to BIP (HRMS Business Intelligence)
2. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) into the 'User' field.
3. Click on the Display button ![icon], and verify the user.
4. On the Roles tab; Click on Display/Change button ![icon] to enter the edit mode.
5. Click on the box to the left of the role(s) to select

St	Role	Type	Valid From	Valid to	Name
▪	ZS_BI_3100_USER_ADMIN	🌐	22.06.2009	31.12.9999	BI:USER ADMINISTRATOR
▪	ZS_BI_GENERAL_ACCESS	🌐	02.04.2009	31.12.9999	BI:GENERAL ACCESS
▪	ZS_BI-FI_ANALYSIS	🌐	08.07.2009	31.12.9999	BI:FINANCE INFOPROVIDE

6. Click on Delete Row ![icon] button to delete the role(s)
7. Click the Save ![icon] button to save the account.

BI UserID Maintenance

For the complete steps of maintenance processes, refer to the previous chapter HCM UserID Maintenance. The steps are the same in BI as they are in HCM.

Reset BI Password (SU01)
Lock/Unlock BI UserID (SU01)
Mass BI UserID Lock/Unlock (SU10)

Some of the options where the SU10 Mass User Maintenance transaction might be more effective than one-at-a-time changes are:
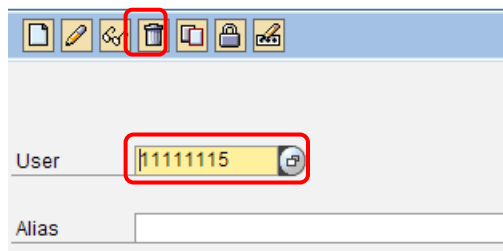
- locking of UserIDs,
- changing Parameters and/or Defaults,
- assigning common roles to a large group

Professional Users Transfer out of the Agency or
Professional Users Become Non-Professional Users (ESS Users):

BI:
1. Log into BIP – Business Intelligence Production – through the SAP Logon Pad
2. Enter transaction '**SU01**' (/nSU01) to delete the UserID.
3. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) into the 'User' field. In this example it is '11111115'. To search for the User, click on ⊞ to search and select the User.
4. Click the Display button ✎ to verify the user
5. Click on the Back button ⊂ to go back to the User Maintenance screen
6. Click the 🗑 'Delete' button
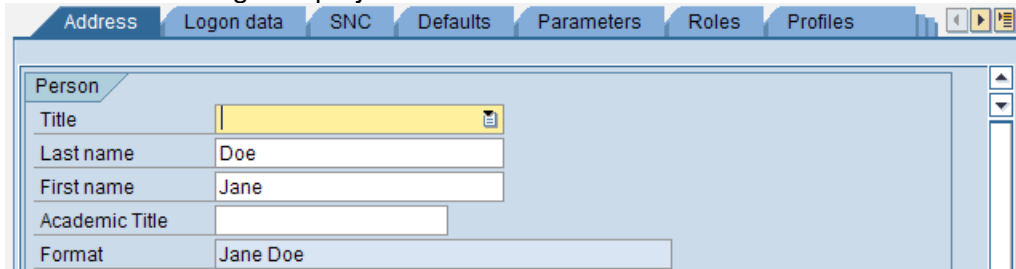
7. A screen like the one below will appear. Click the 'Yes' button if you are sure you want to delete the User. The User is now deleted.
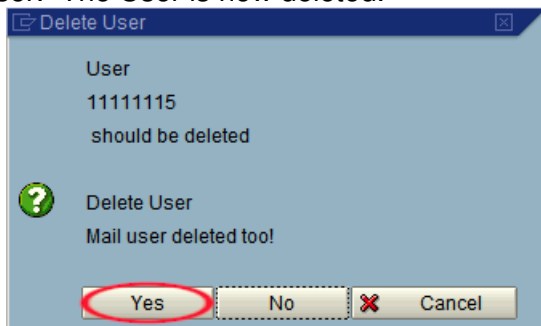
Employee has a Name Change
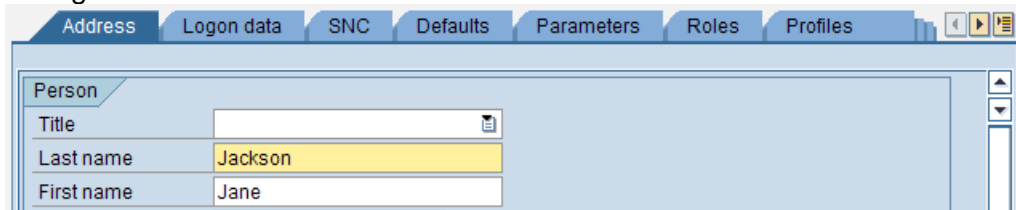
NOTE: *When an employee has a name change and the HCM personnel master record is updated, this change does not update the UserID account (SU01) for that employee in BI. The Agency User Administrator must manually go into SU01 and change employee's name.*

1. Enter transaction SU01
2. Enter the UserID (8 digit Personnel Number, **_including_** leading zeroes) into the 'User' field
3. Click the Display button to verify the user
4. Click on the Change/Display button to enter the edit mode

5. Change Last and/or First name

6. Click on Save to save the account.

E-Recruiting User Administrator SERP_USER_ADMIN

Introduction

This will assist/direct you in the administration and maintenance of **E-Recruiting** UserIDs, to ensure all employees have access to E-Recruiting functionality.

State employees will have both an Employee Self Service (ESS) account and an E-Recruiting account. Employees may access E-Recruiting from their ESS account (My Career tab). This tab allows the state employee to search and apply for jobs through E-Recruiting.

Employees will be able to reset their own password for ESS as long as they have entered their email address in their ESS personal information.

If the password for the ESS account needs resetting, you will perform this action accessing the UserID (personnel number) account in the HRMS Portal. If the email address has been added in ESS the employee will receive an email with their reset password. **NOTE:** *This functionality is not supported on the new IE8 browser.*

If the password for the E-Recruiting account needs resetting, you will perform this action accessing the UserID (personnel number) account in EP0 through the SAPGUI Logon Pad.

There will also be agency Recruiters that will need access to E-Recruiting through the HRMS Portal. Agency Recruiters WILL NOT access E-Recruiting through their ESS accounts but through a different account in the HRMS Portal. We call this a Professional Portal account. This professional account will allow agency recruiters to perform recruiter functions through E-Recruiting. The professional user can also run E-Recruiting reports if assigned the appropriate roles in EP0 and in BI.

To have a successful Professional account for E-Recruiting through the HRMS Portal you will first need to make sure all of the appropriate accounts are created. *The accounts that are needed can be found listed in the Types of E-Recruiting Users section.*

Types of E-Recruiting Users - New to Launch B (October 2008)

♦ Internal Job Seeker – This account is a Non-Professional E-Recruiting account created by DOP Centralized Security Administrators in EP0 to give access for internal job seekers to search and apply for jobs through their My Career tab in Employee Self Service (ESS).

♦ E-Recruiter – This account is a Professional E-Recruiting account where the user performs a variety of recruitment activities. This type of user needs to have the following accounts created:

1. E-Recruiting roles assigned to the UserID account in EP0.
    E-Recruiting professional roles assigned in EP0 should also have a corresponding HRMS Portal Group role assigned to their Professional Portal account. Not all E-Recruiting professional roles have a corresponding portal group role. The available corresponding portal group roles are listed in the crosswalk table below.

E-Recruiting Roles	Portal Roles
SERP_RCF_ASSESSMENT	ER_Assessment_GRP
SERP_RCF_DE_ADMIN_LIMITED	ER_DecentralAdminLimited_GRP
SERP_DE_RCF_JOB_SEEKER_SUPPORT	ER_DeCentralJSSupport_GRP
SERP_RCF_DECISION_MAKER	ER_DecisionMaker_GRP
SERP_RCF_MGR_AS_RECRUITER	ER_ManagerAsRecruiter_GRP
SERP_RCF_RECRUITER	ER_Recruiter_GRP
SERP_RCF_RECRUITER_LIMITED	ER_RecruiterLimited_GRP
SERP_RCF_RECRUITER_SUPPORT	ER_RecruiterSupport_GRP
SERP_RCF_REQ_REQUESTER	ER_RequisitionRequest_GRP

2. Business Intelligence (BI) User Administrator creates UserID account and assigns/verifies the ZS_BI_GENERAL_ACCESS role is assigned in BIP.

3. Professional account in the HRMS Portal. The agency Portal User Administrator checks to see if there is already an LDAP account (email address login account) in the HRMS Portal. If not, then the user administrator creates an agency domain\network username account (UME: example; dop\juliaw). *AND*

   • Assigns the E-Recruiting portal group roles (corresponding to roles assigned in EP0).
   • Map the professional portal account to the BIP userID account.

Maintaining a Professional E-Recruiting UserID Account

Assign Roles to E-Recruiting UserID's

1. Log into **E-Recruiting EP0** (HRMS E-Recruiting Production), from the SAPGUI logon pad.

2. In the transaction field, enter transaction code **SU01** (/nsu01) to get to User Maintenance to assign a role(s) to a UserID.

3. Enter the UserID (8 digit personnel number, **including** leading zeroes) in to the "User" field, **OR**, click on the icon to search and select the User. Click the change icon.
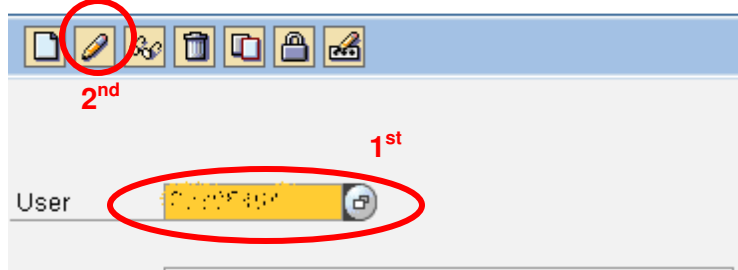
4. If you see the "User xxxxxxxx does not exist" pop-up box, there are a couple of possibilities; either the E-Recruiting UserID has not yet been created, **--or--** the UserID you entered is incorrect. Click the green check, then confirm/verify the UserID you entered is correct. If not, repeat step 3 with correct UserID. If you still see this pop-up, you will have to wait until this E-Recruiting UserID has been created by the DOP New Employee UserID Process (HRUSER process).
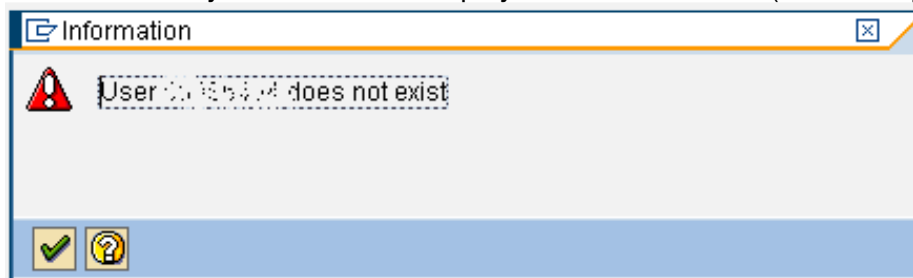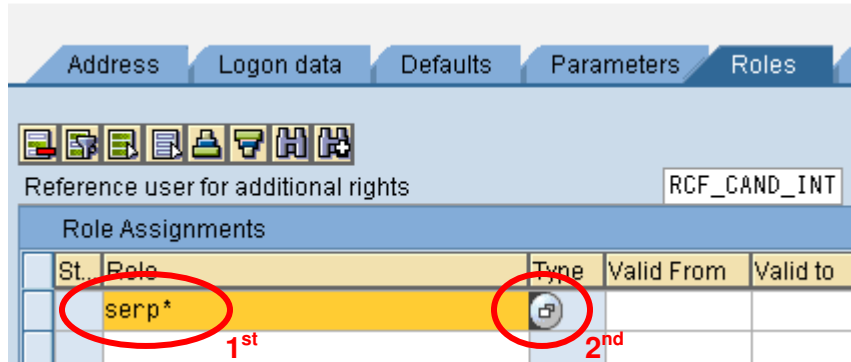
NOTE: *If more than a week has elapsed since the new person was entered into the HRMS database and they still haven't appeared in E-Recruiting (or ESS) call the DOP Help desk at 360-664-6400 and ask for assistance from the DOP Central Security Administrators.*

5. On the "Maintain User" screen, click the "Roles" tab.
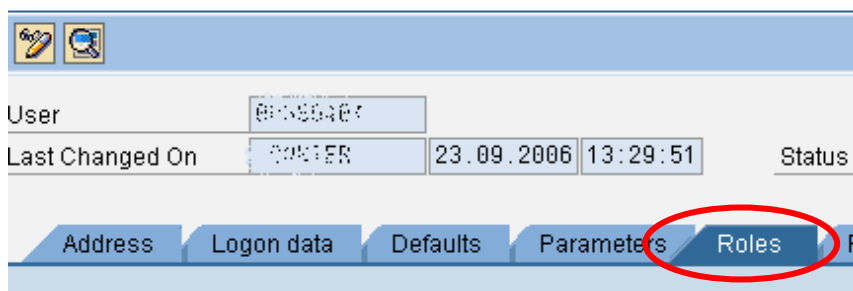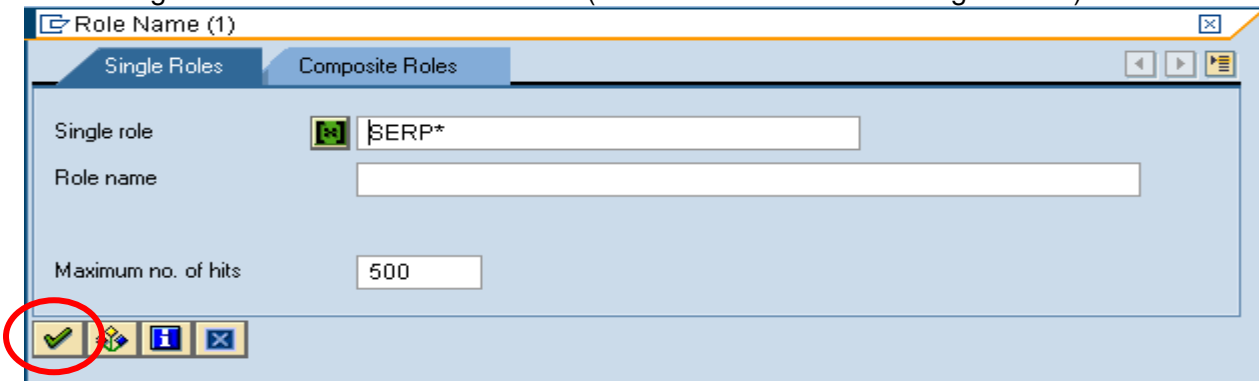
6. Search for the E-Recruiting role to be assigned. Enter "**serp***" in the first empty cell under "Role", and click on ⊡.

7. Click the green checkmark to start search. (Make sure the tab is on Single Roles)
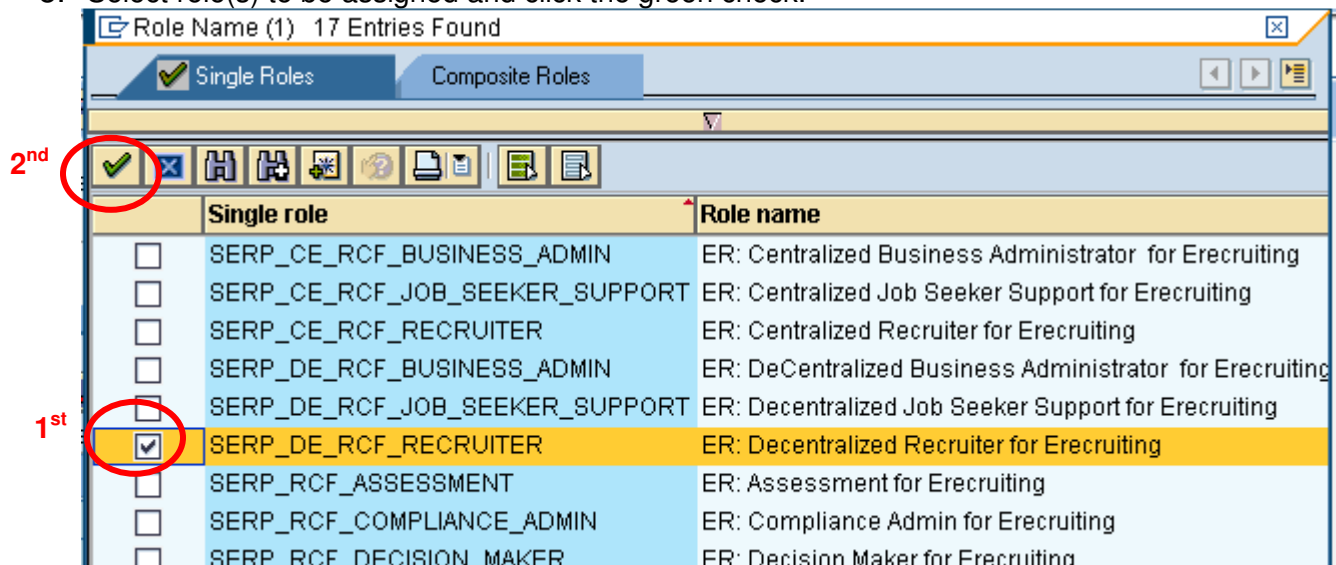
8. Select role(s) to be assigned and click the green check.

9. Click on ![save icon] (just right of the transaction box, top of your screen) to save changes; you should see ![User was saved] in the lower left status area of your screen.

Reconciling the Role

10. On the "User Maintenance: Initial Screen", click ![Display icon] Display.

11. On the "Display User" screen, click the "roles" tab.

Display User
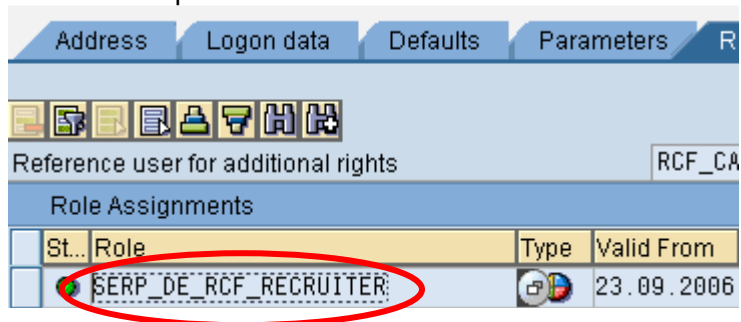
User: [value]
Last Changed On: [value] 16.10.2007 08:52:46 Status

Address | Logon data | Defaults | Parameters | **Roles** | P

12. Double-click the green icon to the left of the role name you just assigned; the "Display Roles" screen will open in a new window.

Address | Logon data | Defaults | Parameters | R

Reference user for additional rights | RCF_CA

Role Assignments

St...	Role	Type	Valid From
	SERP_DE_RCF_RECRUITER		23.09.2006

13. Note the yellow triangle, and click on the "User" tab.

Display Roles

| | Other role | | | | |

Role	
Role	SERP_DE_RCF_RECRUITER
Description	ER: Decentralized Recruiter for Erecruiting

🔍 Description | 🟢 Menu | 🟥 Workflow | 🟢 Authorizations | ⚠ User | MiniA

14. Note the red light, and click on the "User comparison" button.

Display Roles

| | Other role | | | | |

Role	
Role	SERP_DE_RCF_RECRUITER
Description	ER: Decentralized Recruiter for Erecruiting

🔍 Description | 🟢 Menu | 🟥 Workflow | 🟢 Authorizations | ⚠ User | MiniApps

🟢 Organizational Mg... | 🟥 User comparison | 🔵

15. Click on "Complete comparison"

Compare Role User Master Record

Last comparison		Complete adjustment	
User	TONYA	User	TONYA
Date	23.09.2006	Date	23.09.2006
Time	14:24:52	Time	14:24:52

Information for user master comparison	
Status	User assignment has changed since the last user master record comparison

Complete comparison | 🔵 Information | ❌

16. Note the green lights on the "User comparison" button, and on the "User" tab. Click the green "back" arrow to close the window opened in Step #13, and you will return to the "Display User" screen.

17. Click the green "back" arrow and you will return to the User Maintenance screen.

You have just assigned E-Recruiting professional roles in EP0. You will need to contact your agency's BI User Administrator and Portal User Administrator to create the required accounts to access E-Recruiting through the HRMS Portal. BI account will need the required General_Access role assigned; the professional portal account will need the corresponding E-Recruiting portal group roles assigned.

These procedures can be found in the Business Intelligence and HRMS Portal chapters in this handbook.

E-Recruiting UserID Maintenance

For the complete steps of maintenance processes, refer to the previous chapter HCM UserID Maintenance. The steps are the same in E-Recruiting as they are in HCM.

Reset ER Password (SU01)
Lock/Unlock ER UserID (SU01)
Mass Lock/Unlock ER UserID (SU10)

Professional Users Transfer out of the Agency or
Professional Users Become Non-Professional Users (ESS Users):
E-Recruiting: DO NOT DELETE THESE ACCOUNTS! Delete the roles only

1. Login to E-Recruiting EP0 (HRMS E-Recruiting Production)
2. Enter transaction 'SU01' (/nSU01) to delete the roles.
3. Enter the UserID (8 digit Personnel Number, *including* leading zeroes) into the 'User' field
4. Click the Display button to verify the user
5. Click on to enter Edit mode

6. Click on the Roles Tab

7. Click on the box to the left of the role(s) to select

8. Click the Delete Row button to delete the role(s)

9. Click Save.

NOTE: *HCM, BI and Portal User Administrators need to do clean up on these professional user accounts if the users had access to those system*

Employee has a Name Change
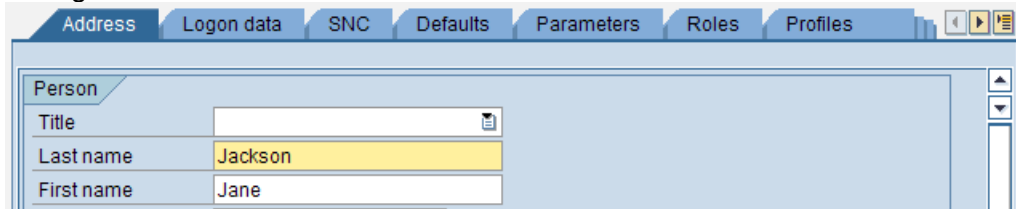
NOTE: *When an employee has a name change and the HCM personnel master record is updated, this change does not update the UserID account (SU01) for that employee in E-Recruiting. The Agency User Administrator must manually go into SU01 and change employee's name.*

1. Enter transaction SU01
2. Enter the UserID (8 digit Personnel Number, ***including*** leading zeroes) into the 'User' field
3. Click the Display button to verify the user
4. Click on the Change/Display button to enter the edit mode

Address	Logon data	SNC	Defaults	Parameters	Roles	Profiles

Person
Title
Last name   Doe
First name   Jane
Academic Title
Format   Jane Doe

5. Change Last and/or First name

Address	Logon data	SNC	Defaults	Parameters	Roles	Profiles

Person
Title
Last name   Jackson
First name   Jane

6. Click on Save to save the account.

HRMS Portal – User Admin

Introduction

There are three types of Portal Logon ID's:

1. Personal ESS User Logon ID - Created by Department of Personnel (DOP). **The Logon ID is the user's 8 digit Personnel Number**. This Logon ID may be locked, unlocked or have its password reset by the Agency's Portal User Administrator(s).

2. Professional LDAP Logon ID - Users accessing the Portal who are connected to the state's Active Directory tree will be granted Portal access based on their email address and network password. **The Logon ID is the user's agency email address.** Password resets for these are the responsibility of the agency network admins.

3. Professional UME Logon ID - Created by the agencies' Portal User Admins. **The Logon ID is the user's agency domain\network username (dop\warrenk).** These accounts require maintenance by the agency User Admins, including creation, deletion, password resetting, locking and unlocking of the accounts, and role/group assignments.

Logon to the HRMS Portal

1. Logon to the HRMS Portal from work; open your web browser and enter this URL if your agency is in the Enterprise Active Directly (*INSIDE* the State Government Network) https://myhrms.wa.gov/irj

2. Logon to Portal from work, home or anywhere outside the State Government Network (SGN) enter: https://wahrms.wa.gov/irj

- Inside the SGN (In the Active Directory) - enter your work email address (like warrenk@dis.wa.gov) as your Logon ID to enter the secure (HTTPS) portal. Use your normal network password to login. If the agency is single sign-on (SSO), users should go directly into the portal. (If you are logging in outside of the SGN you would still use your email address and network password).

- Outside the SGN - If you normally have to log into the Portal using your agency domain\network username (like dis\warrenk) there will be no difference in Logon ID or password from any location.

Professional Portal Accounts

There are two ways to setup access for a user in the Portal. This depends on whether or not your agency is connected to the State Government Active Directory:

1.   If you are IN the State Government Active Directory, your employee's accounts are already created in the portal. The user's email address is his/her Portal Logon ID. Logging into the portal is based on the user's email address and network password and could also possibly be Single Sign On (SSO).

2. If you are NOT a member of the State Government Active Directory, you must Create/Delete your agency Professional Portal UserID/Logon IDs and manage their passwords.

As a Portal User Administrator, you may:
   a. Assign the User_Admin SINGLE role. (*User* Admin*)
   b. Assign the HR_HtmlGui_GRP GROUP role. (Access to HCM through the WEBGUI)
   c. Assign the BI_Reports_GRP GROUP role. (Access to BI reports and/or E-Recruiting reports)
   d. Assign E-Recruiting GROUP Roles (Access to E-Recruiting functionality)
   e. Map the Portal Logon ID to BIP UserID Account.

The image below shows the HRMS Portal. You should at LEAST have the "User Administration" tab shown, and the "Identity Management" sub-tab also selected. Many actions can be initiated from this screen directly: *Create User*, *Delete*, *Lock/Unlock*, and *Advanced Search*.   We recommend using the "Advanced Search" option if you do not know the exact Logon ID.

NOTE: *To search for the e-mail address as a Logon ID you have to use the Advanced Search and search by the e-mail field.*
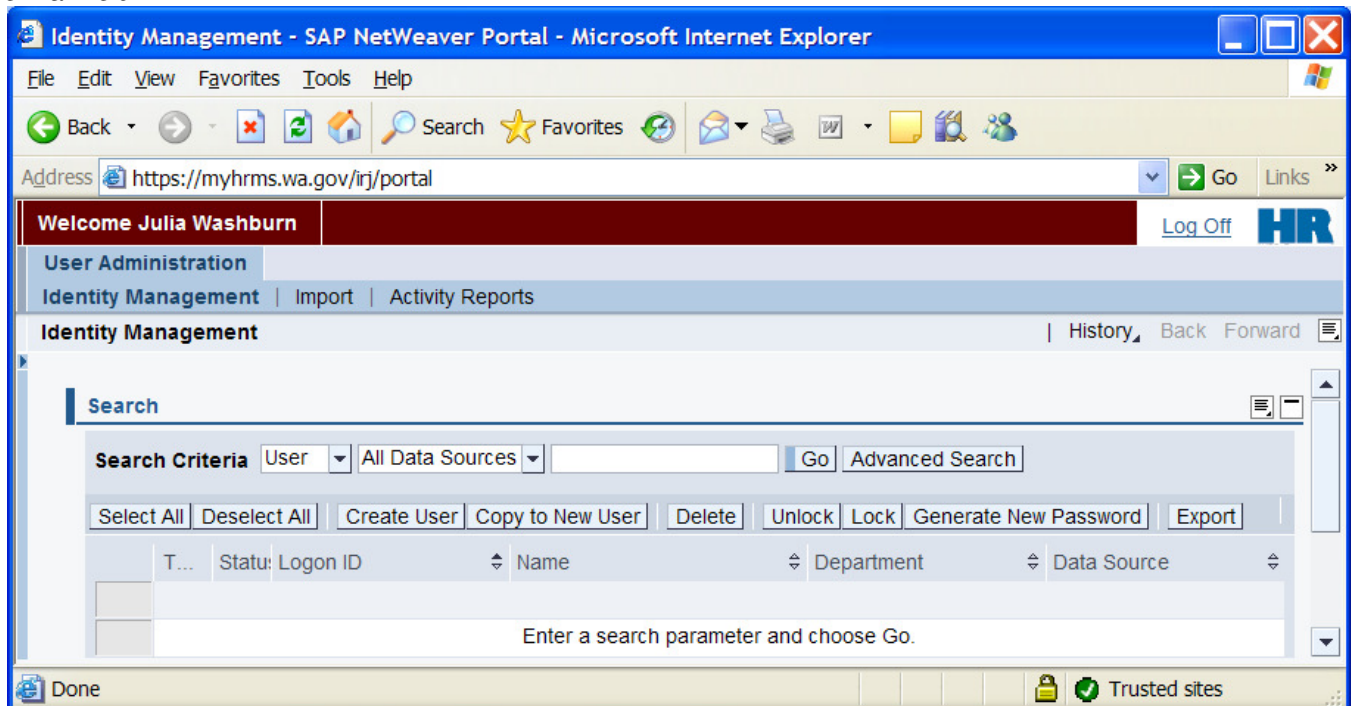
Advanced Search

Select the "Advanced Search" option on the Identity Management screen. This will take you to the following screen:

1. Search for a user by the Logon ID, Last Name, First Name or E-Mail Address
   Hint: When searching you may substitute the asterisk in any character position to represent unknown characters or wrap known characters around multiple asterisks. (EX: warrenk*; *@*.wa.gov)
2. Click the Search button. You will see the screen similar to the one shown below.

3. Click on the user you need. The selected user will be highlighted and the Details view will be shown.

Advanced Search can be used to find all types of Portal user accounts: ESS, Professional LDAP (e-mail) and Professional UME (domain\network username)

Maintaining a Professional Portal Logon ID Account

Creating Professional Portal Logon IDs (UME)

NOTE: *If you are in the Active Directory and/or a Single Sign On (SSO) agency you do not need to create Professional Portal accounts. They are created automatically and the login ID is the e-mail address. To login to those accounts you will need to use your network password. You will only need to assign groups/roles to those accounts and map to the BI account.*

1. Click on the "Create User" button (circled in red above) and your screen format will change to what is shown below:

Details

Save | Cancel

| General Information | Account Information | Contact Information | Additional Information | Assigned Roles | Assigned Groups |

Logon ID: *   DOP\warrenk

⦿ Define Initial Password
◯ Generate Password
◯ Disable Password

Define Password: *   ●●●●●●●●●

Confirm Password: *   ●●●●●●●●●

Last Name: *   Kelly

First Name: Warren

E-Mail Address:

Form of Address:

Language: ▼

Activate Accessibility Feature: ☐

Security Policy: Default ▼

Unique ID:

2. Fill in the data as shown:

- Logon ID - Using your Agency's domain (DOP in this case) slash (\) username (EX: DOP\warrenk)

- Password – enter your own. The initial password can be any generic password. The user will change it to his/her own hardened password at the first log in.

- Last Name and First Name.

3. Click Save. Clicking on the "Save" button will create the UserID/Logon ID. Once you've done this, you can manage this Logon ID.

Assigning Group Roles to Professional LDAP or UME LogonID's

1. Search for a user using the <u>Advanced Search</u> described earlier, select it for editing.
2. Click on the Assigned Groups tab. You will see all the groups that are already assigned to the user. This will include default groups, and distribution lists.
3. Click on the Modify button to enter the edit mode.
4. Search for the Group to assign to the user in the Available Groups section. Enter the full name of the group or a part of the name with wildcards such as HR*
5. Click the Go button. This will show all the Available Groups that meet the search criteria (HR_HtmlGui_GRP in this example)

    Available Portal GROUP Roles.

    Portal BI Reporting GROUP Role:
    ➢ BI_REPORTS_GRP

    Portal WEBGUI GROUP Role:
    ➢ HR_HtmlGui_GRP

    Portal E-Recruiting Professional GROUP Roles:
    ➢ ER_Assessment_GRP
    ➢ ER_DecentralAdminLimited_GRP
    ➢ ER_DeCentralJSSupport_GRP
    ➢ ER_DecisionMaker_GRP
    ➢ ER_ManagerAsRecruiter_GRP
    ➢ ER_Recruiter_GRP
    ➢ ER_RecruiterLimited_GRP
    ➢ ER_RecruiterSupport_GRP
    ➢ ER_RequisitionRequest_GRP

6. Click the box to the left of the Group name to select it. The row will be highlighted.
7. Click the Add button to add the Group role to the Assigned Groups section.

8. Search and assign any additional Group roles if needed. Steps 4 - 7
9. Click the Save button to save the changes to the user account. The newly assigned Group Role(s) will be shown in the "Assigned Groups"
10. You will also need to user map the Portal account to the BI account. Please refer to the Mapping to BI UserID.

Assigning User Admin Single Role to Professional LDAP or UME LogonID's

1. Search for a user using the Advanced Search described earlier, select it for editing.
2. Click on the Assigned Roles tab.
3. Click on the Modify button to enter the edit mode.
4. Search for the User Admin role to assign to the user in the Available Roles section. Enter *User*Admin* in the criteria field
5. Click the Go button. This will show all the Available Roles that meet the search criteria (User Admin in this example). Choose the **User Admin** role.

6. Click the box to the left of the role name to select it. The row will be highlighted.
7. Click the Add button to add the User Admin role to the Assigned Roles section.
8. Click the Save button to save the changes to the user account. The User Admin Role will be shown in the "Assigned Roles". The message [i] User attributes modified will appear at the top of the screen.

Mapping to BI UserID
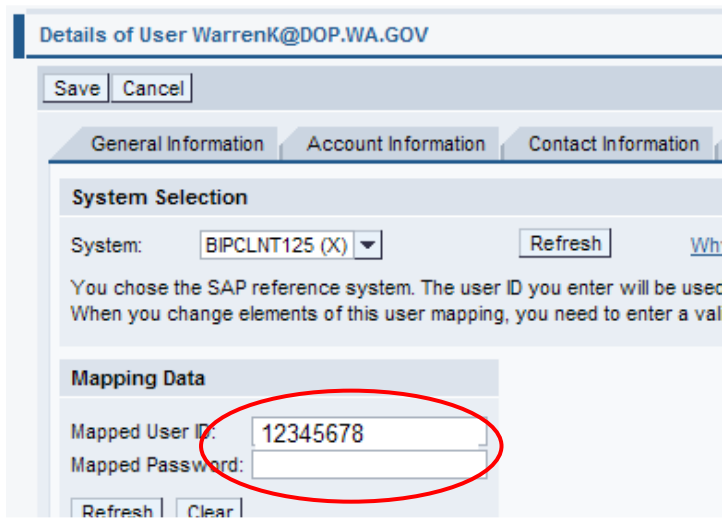
NOTE: *The Professional Portal accounts need to be mapped to BI UserID accounts when the Professional Portal account has BI_Reports_GRP and/or HR_HtmlGui_GRP group or any E-Recruiting group role assigned.*

> *****Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapped to the Federated Portal. You will need to provide the BI UserID and current password and the Professional Portal account userID (LDAP or UME). Send requests to the DOP Service Center at*** servicecenter@dop.wa.gov ***or contact 360-664-6400.***

1. Search for a user using the Advanced Search described earlier, select it for editing.
2. Click on the User Mapping for System Access tab.
3. Click on the Modify button to enter the edit mode.
4. Enter the BIP UserID (8 digit personnel number including leading zeros) into the Mapped UserID field
5. Enter the BIP password for the UserID in the Mapped Password field
    NOTE: *You will have to know the user's BIP password. Most likely it will be the initial password that a BI User Admin created. If it is a productive password, BI User Admin should either reset it or ask the user for their productive BI password.*
6. Click the Save button. The message `ⓘ User attributes modified` will appear at the top of the screen.

7. After a successful mapping you will see an **X** in the System drop down box BIPCLNT125 (**X**)

8. Remember to contact DOP to have the userid mapped in the Federated Portal!

Portal LogonID Maintenance

Reset Portal Logon ID Password

You can reset Portal user passwords in two cases:
- ESS users (8 digit personnel number)
- NON SSO professional users (domain\username)

NOTE: *LDAP e-mail accounts' passwords are reset by your agency's Network Administrators this in turn will change the user's password to their PC.*
NOTE: *UME Professional and Personal ESS user account – if there is an email address in the email field of the account, the new initial password will be sent to the user after you reset it.*
NOTE: *When you are searching for an ESS User Portal account using the advanced search and no user comes up, try searching for their full 8-digit personnel number. The user might have changed their name, in that case you will have to update their name. If the user still does not come up in the search, contact the DOP Help Desk with the User's name and full 8-digit personnel number.*

1. Search for a user that needs his/her password reset either using the search box, or the Advanced Search option.
2. Click on the box to the left of the user to select it, the line will become highlighted.

3. Click the Modify **Modify** Button to enter the edit mode.

4. Enter Define Password and Confirm Password
5. Click the Save button

Lock/Unlock Portal Logon ID's

1. Logon to Portal; open your web browser and enter this URL: https://myhrms.wa.gov/irj or https://wahrms.wa.gov/irj.
2. Search for a user by either entering something in the search box (EX: dop*) or using the Advanced Search option.
3. Click the box to the left of the Logon ID to select the user.

To LOCK a specific Portal Logon ID

   a. At the search response form, click on the selection box to the left of the desired user's name and click the "lock" button

b. You will be prompted to enter a reason for the lock, after entering reason text, click Lock .

c. Upon successful lock, a message will appear and the user's Status Icon will change from Green Circle to a Blue Diamond.

To UNLOCK a specific Portal Logon ID

d. Select the box to the left of the Portal Logon ID you want to unlock and click the Unlock button ABOVE the name.

e. You will be prompted to enter a reason for the unlock, after entering reason text, click the Unlock button BELOW the Reason box.

f. Upon successful unlock, a [image: User(s) unlocked] message will appear and the user's status icon will change to a green ball.

Delete PORTAL domain\username Accounts (UME)

NOTE: *For the process when people leave your agency refer to [UserID Maintenance when Employees (ESS/Professional Users) Leave the Agency](#)*

1. Logon to HRMS Portal; https://myhrms.wa.gov/irj or https://wahrms.wa.gov/irj.

2. Search for a user using the Advanced Search option.

3. Enter Last Name and couple of letters of the first name with an *
4. Click Search

5. Users will be displayed in the table.
   - If your agency is outside the SGN your professional user accounts will be your agency domain\username such as **dop\username** (UME)
   - If your agency is inside the SGN your professional user accounts will be your agency e-mail address such as LastFirst@dop.wa.gov (LDAP).
   - 8 digit personnel number account could also be displayed. This is an ESS account.

	T...	...	Logon ID	Name	Department	Data Source
	👤	🟢	00000000	WASHBURN, JULIA	DOP	UME Database
	👤	🟢	dop\username	Washburn, Julia		UME Database
	👤	🟢	LastFirst@dop.wa.gov	Washburn, Julia C (DOP)		LDAP

6. Click the box to the left of the Logon ID to select the user
7. Click the Modify button to enter the edit mode
8. Click the User Mapping for System Access
9. Click the Clear button to clear the mapping
   **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal. You will need to provide the BI UserID and current password and the Professional Portal account userID (LDAP or UME). Send requests to the DOP Service Center at servicecenter@dop.wa.gov or contact 360-664-6400.

10. Click the Save button.

10

Save Cancel

8

| Additional Information | Customized Information | Assigned Roles | Assigned Groups | User Mapping for System Access |

System Selection

System: SAP_BW (X) ▼   Refresh   Why are some systems missing?

You chose the SAP reference system. The user ID you enter will be used for Single Sign-On to several or all SAP systems. When you change elements of this user mapping, you need to enter a valid password to prove your identity.

Mapping Data

Mapped User ID: 12345678

Mapped Password:

9

Refresh Clear

11. With the user still selected click the "delete" button

Search

Search Criteria User ▼ All Data Sources ▼ dop*   Go Advanced Search

Select All Deselect All   Create User Copy to New User   Delete   Unlock Lock Generate New Password

Export

	T...	Statu	Logon ID	Name	Department	Data Source
	⚫	dop\testuser	Test, User		UME Database

12. Enter the reason for the account deletion and click Delete button.

13. Upon successful deletion, the following message will appear at the top of the User List.

Delete Access from PORTAL E-Mail Account (LDAP)

NOTE: *You cannot delete an LDAP e-mail account.*

14. Logon to Portal; https://myhrms.wa.gov/irj or https://wahrms.wa.gov/irj.
15. Click the Advanced Search button
16. Enter the Last name and Couple of letters of the first name with an *, and click the Search button

17. Click on the e-mail (LDAP) account

18. Click the Modify button to enter editing mode
19. Click the Assigned Roles tab. If there are any roles you need to delete them.
20. Click on the User Admin role
21. Click the Remove button; the removed role will be moved to the Available Roles section. Remove any other assigned roles.

22. Click on the Assigned Groups tab
23. Click on the All Data Sources drop down and choose UME Database and Click Go

24. Click on the Group role
25. Click the Remove button; the removed Group Role(s) will be moved to the Available Groups section. Remove any remaining Group Roles.

26. Click the User Mapping for System Access
27. Click the Clear button to clear the mapping

**Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal. You will need to provide the BI UserID and current password and the Professional Portal account userID (LDAP or UME). Send requests to the DOP Service Center at servicecenter@dop.wa.gov or contact 360-664-6400.

28. Click the Save button.

15

13

14

Non-Professional Users (ESS Users) Leave State Employment – Employee Status is Withdrawn:

HRMS PORTAL:

1. Logon to Portal; https://myhrms.wa.gov/irj or https://wahrms.wa.gov/irj
2. Search for a user by entering the 8 digit personnel number in the Search Box

3. Click on the Name of the User and click the Delete button

4. Enter the reason for deletion and click the Delete button.

5. After successful deletion, the following message will be displayed.

Professional Users Transfer out of the Agency or Professional Users Become Non-Professional Users (ESS Users):

HRMS PORTAL domain\username UME account:

1. Logon to HRMS Portal; https://myhrms.wa.gov/irj or https://wahrms.wa.gov/irj.

2. Search for a user using the Advanced Search option.

3. Enter Last Name and couple of letters of the first name with an *
4. Click Search

5. Users will be displayed in the table.
   - If your agency is outside the SGN your professional user accounts will be your agency domain\username such as **dop\username** (UME)

- If your agency is inside the SGN your professional user accounts will be your agency e-mail address such as LastFirst@dop.wa.gov (LDAP).
- 8 digit personnel number account could also be displayed. This is an ESS account.

	T...	...	Logon ID	Name	Department	Data Source
	👤	🟢	00000000	WASHBURN, JULIA	DOP	UME Database
	👤	🟢	dop\username	Washburn, Julia		UME Database
	👤	🟢	LastFirst@dop.wa.gov	Washburn, Julia C (DOP)		LDAP

6. Click the box to the left of the Logon ID to select the user and click the "delete" button

7. Enter the reason for the account deletion and click Delete button.

Are you sure you want to delete selected user(s)? Provide a reason for this action.
Message to Users:

Employee transfered to another agency.

8. Upon successful deletion, the following message will appear at the top of the User List.

ℹ The selected user has been deleted or cleaned up

HRMS PORTAL e-mail LDAP account:

NOTE: *You cannot delete an LDAP e-mail account.*

1. Logon to Portal; https://myhrms.wa.gov/irj or https://wahrms.wa.gov/irj.
2. Click the Advanced Search button
3. Enter the Last name and Couple of letters of the first name with an *, and click the Search button

4. Click on the e-mail (LDAP) account

5. Click the Modify button to enter editing mode
6. Click the Assigned Roles tab. If there are any roles you need to delete them.
7. Click on the User Admin role
8. Click the Remove button; the removed role will be moved to the Available Roles section. Remove any other assigned roles.

9. Click on the Assigned Groups tab
10. Click on the All Data Sources drop down and choose UME Database and Click Go

11. Click on the Group role
12. Click the Remove button; the removed Group Role(s) will be moved to the Available Groups section. Remove any remaining Group Roles.

13. Click the User Mapping for System Access
   14. Click the Clear button to clear the mapping
      Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal. You will need to provide the BI UserID and current password and the Professional Portal account userID (LDAP or UME). Send requests to the DOP Service Center at servicecenter@dop.wa.gov or contact 360-664-6400.

15. Click the Save button.

Employee has a Name Change

NOTE: *When an employee has a name change and the HCM personnel master record is updated, this change does not update the ESS User account (8 digit personnel number) or the UME professional account (domain/username) for that employee in the Portal. The Agency User Administrator must manually go into the Portal and change the employee's name on the ESS account, and recreate the Professional UME account with the new name and logonID.*

Changing the Name in the ESS or domain\username (UME) Portal Account

1. Logon to Portal; https://myhrms.wa.gov/irj or https://wahrms.wa.gov/irj
2. Type in the user's 8digit personnel number in the search box for ESS user account

3. Click the Go [Go] button

4. Click on the user. The line with be highlighted in orange and the details will be displayed below

5. Click on the Modify `Modify` button

6. Edit the Last and/or First name

7. Click Save `Save`

Changing the LogonID for the domain\username (UME) Portal Account

NOTE: *In order to change the LogonID in the UME Professional Portal account (domain\username) you will have to create a new Professional Portal account assign roles/group roles, and map to BI. Then delete the old Professional Portal account with the old name.*